

North Carolina Department of Health and Human Services

Opportunities for Philanthropy to Support Medicaid Expansion*

February 2024

On December 1, 2023, more than 600,000 North Carolinians became newly eligible for full health care coverage through Medicaid. Expansion of Medicaid coverage, authorized in the 2023-25 biennium budget,¹ means that people ages 19 through 64 years with incomes too high to qualify for Medicaid but too low to easily afford other health care coverage will be able to pay for doctor visits, yearly check-ups, emergency care, hospital services, maternity and postpartum care, prescription drugs, behavioral health, preventive and wellness services, mental health care, some vision, hearing, and dental services, and more at little or no cost.²

Roughly 300,000 people participating in the limited-coverage NC Family Planning Medicaid program for reproductive health services were automatically enrolled for full Medicaid coverage.³ Over the next two years, the North Carolina Department of Health and Human Services (NCDHHS) seeks to increase enrollment to all North Carolinians newly eligible for full Medicaid coverage.

NCDHHS is implementing Medicaid expansion (see discussion below on implementation activities) but lacks resources to support the kind of full-scale community-based outreach and enrollment initiatives that would help ensure enrollment of all who are newly eligible for coverage. This document identifies the work NCDHHS is leading to implement Medicaid expansion and close the health care gap in North Carolina and areas of need presenting opportunities for philanthropy to support the state's work.

NC DHHS expansion activities

NCDHHS has prioritized agency investments in expansion implementation activities that help facilitate consistency and availability of information related to Medicaid expansion, eligibility, and enrollment, and direct community members to enrollment sites.

¹ Medicaid expansion was approved in March 2023 as part of the 2023 Appropriations Act (House Bill 259) but enacted with passage of the state budget in September 2023.

² More than 2.8 million North Carolinians were enrolled in Medicaid in November 2023. (See <https://medicaid.ncdhhs.gov/medicaid-enrollees-month-sfy2024-sfy2009-nov-7-2023/download?attachment.>) Before December 1, 2023, full Medicaid coverage in North Carolina was available only for adults earning up to 42 percent of the federal poverty level for their household size excluding most adults without dependent children. With the expansion of Medicaid effective December 1, 2023, adults ages 19 through 64 earning up to 138 percent of the federal poverty level for their household size (e.g., single adults earning \$1,676 pre-taxes per month or less (\$20,120 per year) or families of three earning \$2,859 pre-taxes per month (\$34,307 per year)) may be eligible for comprehensive coverage. (See <https://medicaid.ncdhhs.gov/medicaid-expansion-questions-and-answers-english/open.>)

³ Family Planning Medicaid provides reproductive health care at no cost for people with incomes at or below 195 percent of the federal poverty level (or \$2,370 per month for a single adult). Only people receiving Family Planning Medicaid before December 1 with incomes meeting the new Medicaid eligibility requirements were automatically upgraded to full Medicaid coverage. (See <https://medicaid.ncdhhs.gov/medicaid-expansion-questions-and-answers-english/open.>)

Communications

NCDHHS developed a communications strategy that would help ensure availability and accuracy of information regarding Medicaid expansion (eligibility, benefits, application process, enrollment locations, etc.) consistently statewide. Communications materials that the agency has produced include a [new website](#) highlighting:

- Basic information on [eligibility](#) for Medicaid and [applying](#) for Medicaid coverage,
- A [toolkit](#) of resources in English and Spanish for organizations to use to spread the word to their communities on eligibility and how to apply. The toolkit includes new English and Spanish language resources to help educate North Carolinians on eligibility and how to apply. These bilingual resources include [a sign-up form](#) for NC Medicaid updates; outreach materials (e.g., flyers) for print and electronic distribution; social media content; FAQs; presentation materials for community organizations to use with their constituent communities; and a step-by-step video on how to apply online through [ePASS](#), a secure, self-service online platform.
- A [Medicaid expansion dashboard](#) updated monthly to track the number of people (by health plan, demographics, and county) enrolled in Medicaid under Medicaid expansion.

In addition, NCDHHS launched a paid media campaign on January 15, 2024, to reach prospective Medicaid beneficiaries through digital media (social media, streaming radio, search, etc.) and traditional media (TV, radio, out of home, etc.) and focused on reaching historically marginalized populations and rural audiences, especially in counties bordering other states.

Partner support

NCDHHS is providing non-financial support (i.e., technical assistance, educational materials, etc.) for partner organizations governed and operated at the local level that deliver Medicaid-covered health care services and assist with Medicaid enrollment. NCDHHS' local partners include county-based Department of Social Services (DSS) offices and community-based organizations that provide "navigation" help for consumers by 1) directing them to information about Medicaid eligibility and where to enroll; and 2) providing direct assistance in initiating and completing the Medicaid enrollment process. (The [NC Navigator Consortium](#), a statewide network of federally qualified health insurance navigators, also assists consumers with enrollment in Medicaid.) NCDHHS continues to engage 85+ partner organizations as part of its External Implementation Partners Workgroup. This workgroup, along with the Health Access, Communications, Member Enrollment, and Data & Evaluation subgroups, was convened in April 2023 to facilitate continuous flow of information, ideas, and real-time feedback from community partners.

NCDHHS has also directed financial support to counties. In June 2023, NCDHHS allocated \$8.355M to counties statewide to support preparation for Medicaid expansion implementation.⁴

To support increasing numbers of North Carolinians applying for Medicaid, NCDHHS created the [Medicaid Ambassador Initiative](#) to:

⁴ Authorized during the 2023 legislative session, House Bill 76 (Session Law 2023-7) appropriated "advance funding" to help counties prepare for Medicaid expansion implementation. These funds were to become available on October 1, 2023, but in May 2023, NCDHHS notified counties that they would receive this advance funding and before October 1. NCDHHS determined the amount of advance funding based on the \$1.667M per month legislative allocation for counties to cover eligible costs for five months (May 2023 through September 2023) leading up to October 1.

- Coordinate statewide efforts to identify and publicize the community members and organizations that provide Medicaid expansion information and help people enroll;
- Recruit community-based organizations seeking to serve as enrollment sites and direct them to educational support on enrollment for their staff and volunteers; and
- Coordinate communications statewide on the issues, challenges, and problem-solving strategies emerging as Medicaid enrollment increases.

In addition, three statewide nonprofits, Legal Aid of North Carolina, Care Share Health Alliance, and North Carolina Community Health Center Association, with philanthropic support,⁵ are collaborating to:

- Provide training on Medicaid expansion and enrollment,
- Coordinate among themselves and with external partners on Medicaid expansion information and activities, and marketing efforts targeting underserved and vulnerable populations, and
- Support consumers in scheduling in-person enrollment assistance appointments.

The Hispanic Federation has also received philanthropic funds⁶ to conduct outreach on Medicaid expansion (including establishing a statewide information hotline for Spanish-speaking individuals) and help prospective Medicaid members schedule appointments with Spanish-speaking enrollment navigators.)

As of this writing, due to limited resources, NCDHHS is using temporary staff to implement the Ambassador Initiative, which at present has primary responsibility for facilitating recruitment of “grassroots” organizations providing “on-the-ground” services to local communities that can 1) identify community members eligible for though unaware of Medicaid expansion (using door-to-door efforts as needed given community characteristics and needs); and 2) help them apply for Medicaid. NCDHHS has implemented an [online Ambassadors volunteer webpage](#) and plans to identify Ambassadors by county on its Medicaid expansion site.

Opportunities for philanthropic support

NCDHHS leaders and staff have identified several implementation activities requiring additional resources to sustain them long enough to ensure enrollment of all North Carolinians newly eligible for Medicaid. These needs largely present opportunities for philanthropic support for direct community outreach and enrollment, and also data analysis that will help identify the communities and localities needing more outreach and enrollment support.

State-level coordination

NCDHHS seeks to continue the communication and coordination services the Ambassador Initiative provides through 2026. The agency’s overarching goal is to ensure community-based supports for helping people apply for Medicaid and recognizes the need for a state-level point of contact that community-based organizations can access for support and guidance in helping to direct consumers, advocates, and community-based organizations to outreach and training resources on Medicaid expansion and assistance with Medicaid enrollment. The agency also foresees using the Ambassador

⁵ Foundations supporting this effort include Cone Health Foundation, Dogwood Health Trust, Kate B. Reynolds Charitable Trust, and the John Rex Endowment.

⁶ Foundations supporting the Hispanic Federation include the Camber Foundation and Kate B. Reynolds Charitable Trust.

Initiative to coordinate or facilitate communications and other activities that address issues anticipated to arise with Medicaid expansion (e.g., support for families needing assistance; helping individuals who want to apply navigate the process and identify what information and documents they need; and providing the technology to apply online).

Opportunity: Support for the Ambassador Initiative. The Ambassador Initiative requires additional funding to sustain the outreach and enrollment support needed to support NCDHHS in attaining its enrollment goals. With funding support, NCDHHS could hire staff to manage and maintain the program. Alternatively, an external partner organization or network could take over the Ambassador Initiative or otherwise implement the Ambassador Initiatives activities.⁷

Opportunity: Communications and marketing materials. NCDHHS is interested in securing funding to support ongoing Medicaid enrollment marketing efforts (e.g., developing enrollment marketing materials, paid media spots) beyond December 2024. In particular, NCDHHS seeks to develop marketing materials specific to individuals 19-25, and also materials focused on parents that may be deployed as part of a back-to-school initiative in Fall 2024 or 2025.

Opportunity: Provider recruitment. NCDHHS seeks to develop an outreach campaign (e.g., advertisements) to engage healthcare and other providers, especially in rural communities, to participate in Medicaid. In particular, NCDHHS is interested in implementing a program for dentists that will provide them long-term incentives for their participation in Medicaid.

Local community-level support

NCDHHS' primary local partners are experiencing varying levels of staffing statewide. Many are significantly understaffed and have limited capacity to directly assist prospective new Medicaid members navigate ePASS, the Medicaid enrollment platform, the complexity of which requires "over the shoulder" help for most consumers to use and understand. Community-based partners can increase community capacity to enroll new Medicaid members by providing alternative enrollment sites and staff or volunteers trained to assist consumers using ePASS to enroll in Medicaid.

Opportunity: Support for community-based partners. Many community-based organizations with deep reach into marginalized communities are not receiving financial support to assist with Medicaid outreach and enrollment. Many of these organizations participated in the [Healthier Together network](#) that received federal COVID-19 relief funds disbursed through NCDHHS and were effective partners in educating communities and supporting vaccine dissemination. As NCDHHS lacks similar funding for these community-based partners, the agency encourages philanthropic partners to direct financial support to them. Specific needs include:

- Support for organizations supporting Medicaid expansion and encountering or otherwise serving and supporting individuals who do not qualify for Medicaid (e.g., undocumented individuals, residents over age 65) especially in rural areas (e.g., rural health clinics), and

⁷ See, e.g., North Carolina Department of Health and Human Services. (2023). North Carolina Medicaid's Community Health Worker Strategy. Available at <https://medicaid.ncdhhs.gov/community-health-worker-strategy-public-comment/download?attachment>. This report from February 2023 was developed to support community health workers (CHWs) in serving Medicaid members and proposes a strategy for more deeply engaging CHWs with Medicaid members.

- Language access and other culturally and linguistically appropriate supports that can help community-based organizations and DSS offices communicate with communities that are not native English speakers to understand the application process.

Opportunity: One-time financial support or equipment/technology donations for local DSS offices. In working with DSS offices statewide to prepare for Medicaid expansion, NCDHHS staff have observed staffing and infrastructure disparities among DSS offices county to county. Though NCDHHS provided financial assistance to all counties to support their Medicaid expansion activities and the continuous coverage unwinding period, local DSS offices may have additional needs related to the rollout of a new statewide child welfare system with mobile capacity.

Enrollment implementation research

NCDHHS has enrollment data and is working with research partners to analyze Medicaid expansion data. In addition to understanding rates of enrollment statewide (e.g., numbers of people enrolling in Medicaid county-to-county, demographics, etc.), the agency seeks to understand how effectively and equitably enrollment implementation is occurring. Such data would help the agency determine outreach and assistance practices that are working to enroll new Medicaid members, particularly among historically under-enrolled and under-served communities and help direct limited state resources to communities and localities needing more enrollment support.

Opportunity: Enrollment implementation data analysis. NCDHHS seeks funding for research partners to conduct enrollment implementation evaluation studies that analyze the consumer experience. Using qualitative methods (e.g., surveys and interviews) NCDHHS seeks to highlight the impact of North Carolina's experience as a Federally Facilitated Marketplace (FFM) Determination state and answer questions related to how consumers have navigated enrollment, such as: What has helped or impeded their enrollment in Medicaid? Where have consumers received answers to their questions about Medicaid enrollment?

Opportunity: Case study on Medicaid expansion. NCDHHS is interested in detailing its experience for the benefit of other states, particularly peer Southern states that have not undertaken Medicaid expansion. Funding and research partners working with NCDHHS would help illuminate the experience of a Southern state with Medicaid expansion and highlight accomplishments in North Carolina that may inform decision-making in other states.

Opportunity: NCDHHS anticipates future research and program evaluation needs arising as Medicaid expansion continues and welcomes further exploration of partnership opportunities.

Future needs

NCDHHS anticipates that Medicaid enrollment helpers and newly eligible Medicaid members and enrolled service providers will experience new challenges as people enroll and access benefits. NCDHHS invites philanthropy to continue engaging with the agency to share ideas, concerns, and other information that would help identify additional opportunities for philanthropic support over the next two years and will periodically update this document.

For more information contact LaQuana Palmer, Deputy Director of NC Medicaid Communications and Engagement at laquana.palmer@dhhs.nc.gov