

Spotlight on Member Engagement and Elevating the Consumer Voices

Commonwealth Care Alliance (CCA) and the Center to Advance Consumer Partnership (CACP)

The NORC Medicaid Managed Care Organization (MCO) Learning Hub shares timely and relevant resources to support Medicaid MCOs and other stakeholders in improving their members' health and increasing health equity and health care transformation advancements. We encourage you to share your experiences and feedback on future Medicaid MCO Learning Hub work so we can better serve your needs. To start the conversation or join our distribution list, please email us at MCOLearningHub@norc.org.

The Medicaid MCO Learning Hub "Spotlight Series" highlights key initiatives addressing health equity driven by, or in partnership with, MCOs to inform the Robert Wood Johnson Foundation (RWJF) and its grantees. In addition, the series provides MCOs, community-based organizations, states, and other key stakeholders with examples of successful models of organizations working together to advance health equity.

This "Spotlight" focuses on an organization working internally and with other organizations to promote authentic member engagement and consumer partnership. Forthcoming Spotlight Series briefs will focus on other existing initiatives and partnerships around health equity.

Member and family engagement occurs on a [continuum](#).¹ This continuum spans from *outreach* or providing the community with information, to *shared leadership* or a robust and bi-directional partnership structure where final decision-making occurs at the community level. MCOs' engagement with consumers spans this continuum of engagement.

NORC's Medicaid MCO Learning Hub spoke with Melinda Karp, Commonwealth Care Alliance (CCA) Senior Vice President, Consumer Partnership, and Executive Director of the Center to Advance Consumer Partnership (CACP).^{*} We discussed CCA's strategies for promoting authentic member engagement internally and working with other organizations through CACP to advance consumer partnership.

¹ See Principles of Community Engagement:
https://www.atsdr.cdc.gov/communityengagement/pce_what.html

Background

ABOUT THE COMMONWEALTH CARE ALLIANCE (CCA)

CCA is a Massachusetts not-for-profit, community-based health care organization dedicated to improving care for more than 40,000 individuals dually eligible for MassHealth (Medicaid) and Medicare.

CCA's national reputation for expertise and success in caring for individuals with complex health and social needs is due in no small measure to this model of care based on authentic partnership. CCA staff work side by side with members every day to maintain their autonomy, dignity, and self-determination; encourage their engagement and self-management; and show respect for their values, preferences, and expressed needs.

CCA members participate as consumer partners to effectively translate their lived experience into insights that improve quality, reduce cost, and improve the care experience in ways that would not otherwise be attainable.

ABOUT THE CENTER TO ADVANCE CONSUMER PARTNERSHIP (CACP)

CCA founded CACP as a not-for-profit organization to leverage CCA's successful models and drive widespread adoption of authentic partnerships between health care organizations and the consumers they serve. CACP works with innovative health care and human services leaders across the country to develop capabilities, build infrastructure, and cultivate relationships that ensure consumers with the most significant needs become enduring organizational partners, invaluable to shaping strategy and action.

CCA's Member Engagement Strategies

Q: How does CCA approach member engagement and consumer partnership?

Partnering with our members as “experts by experience” is not only central to CCA's organizational mission and vision; it is also an important component of our business model and strategy.

We view members as the experts in their own lives; they are uniquely positioned to translate their lived experiences into insights and innovations that enable us to drive quality improvement, reduce costs, and improve every members' care experience.

At CCA, we routinely access the insights and expertise of those with lived experience, which not only helps to shape our decisions, but also helps to shape our priorities. Member feedback is not an after-thought to validate what has already been done, but is a precursor to help define the problem or issue at hand, as well as the solution.

Member Voices Program

Like many organizations, we initially relied on regional consumer advisory councils to bring the consumer voice into our work. However, after several years we realized that those groups alone did not provide sufficient infrastructure to meet our goals to embed member expertise into our culture and business activities. In 2017, we introduced our Member Voices program, which expanded upon and diversified CCA's member engagement program to a multi-faceted model that includes our existing advisory groups along with multiple other channels for integrating members' insights, perspectives, and engagement. CCA's Member Voices program consists of a cohort of over 500 members who serve as consultants based on their lived experience. We ensure that the composition of members in the program are demographically representative of our broader member population.

Through CCA's Member Voices program, we have created the organizational capability to incorporate members' voices as a standard set of inputs into operational, clinical, governance, and strategic decision-making critical to achieving authentically consumer-centered operational, care, and service delivery models. In addition to consumer advisory councils, our members can participate in topic-specific focus groups, individual interviews, CCA project teams, co-design workshops, surveys, and online feedback groups. This infrastructure allows us to quickly and easily tap our most valuable consultants – the people we have committed to serve – so that we are never out-of-touch.

In the years since the Member Voices program began, members have served as expert consultants on well over 100 CCA engagements across a broad range of topics including: selection of a new transportation vendor;

improving medication adherence; understanding how members use technology and the value of potential telehealth solutions; developing new member-facing care and support innovations; improving member communications; understanding service and quality barriers related to durable medical equipment and long-term service and supports; and re-designing the member onboarding processes.

Q: What strategies does CCA employ to develop an organizational culture of authentic member engagement?

Time and energy are scarce. Leaders and organizations need to know where to invest them -- with confidence. That confidence comes from organizations listening to many voices, not just the loudest or those that have the time, energy, or resources to engage.

GAINING UNDERSTANDING AND EMPATHY IS A CORE COMPETENCY

Without insight and empathy, we were concerned that we would have blind spots about where and how to invest energy and resources. We wanted to invest in approaches that helped us see around the corners. Thus, we use a journey map as the tool to ensure a firsthand and ongoing understanding of our members' lives with us, and to build organizational empathy for those we serve.

Many definitions of "journey map" describe it as a visual picture of consumers' experience with an organization's services or products (tangible/physical or digital). Journey mapping uses two powerful ways to communicate the relationship organizations have with consumers in a succinct and memorable way – storytelling and visualization. Importantly, a journey map identifies:

- (1) pain points – an interaction in which consumers have negative or frustrating experience; and
- (2) moment that matters – an interaction that is very important and therefore disproportionately shape the consumer experience and perception about an organization or service. Moments that matter are associated with interactions that have high emotional value, set significant expectations, or are critical needs for consumers.

The journey map lays the foundation for a culture that reinforces the power of consumers' lived experience, creates a roadmap for operational change, and highlights opportunities for organizations to create responsive solutions that can help improve care and services. The

map is a critical building block for making decisions about strategy, operations, and resource allocation.

For us, a journey map is not a static snapshot. Instead, it is a living, breathing document that can capture consumers' experiences at different touchpoints with the organization and serve as an ongoing framework for improvement.

DEFINE YOUR INTENT – METHODICALLY ASSESS IMPACT

Defining what success looks like requires several discrete activities which include: setting objectives, assessing outcomes, understanding how to measure those outcomes, and identifying where you are as an organization and the existing gaps. We are rigorous about testing new ways of doing things, and we also collect data to determine if our efforts are having the intended impact. A great journey map goes beyond revealing the moments that matter and consumer pain points; rather a great journey map links those critical touchpoints with organizational performance metrics.

WHO IS AT THE TABLE MATTERS –ENSURE A DIVERSITY OF VOICES

Because information is the foundation of decision-making, it matters a great deal who contributes to generating information and insight. We know firsthand that it is easier to engage people who have the time, inclination, and energy to participate. So we are always asking the question, "Whose voices aren't we hearing?" and customizing outreach to ensure diverse perspectives are included. Organizations need to make sure to lift up the voices that often go unheard and tap a broad array of individuals so that organizations gain a diverse set of perspectives and glean insights that have both breadth and depth.

HOW YOU ENGAGE MATTERS –TAILOR OUTREACH EFFORTS AND CREATE A SAFE SPACE

There are a lot of different methods of engagement depending on the person. Some individuals love group settings, while others prefer one-on-one engagement. Some are comfortable with using technology, while others are less so. Some are available during business hours, while others are not. With this in mind, we tailor and customize our outreach. We find that this tailored approach signals our respect for individual needs and ensures a better level of engagement than a more blanket, uniform approach. We have built those process steps into our Member Voices program's recruitment process, so we

know ahead of time how each person feels most comfortable engaging with us.

“If we cannot figure out how to engage a member – that is our problem, not theirs. That means we missed something in helping them feel safe engaging with us. But we work hard to hear all voices, not just the ones that are most likely to come to the table on their own.”

DEFINING THE PROBLEM/ISSUE IS AS IMPORTANT AS FINDING A SOLUTION –CHECK ASSUMPTIONS AT THE DOOR

Not only do consumers help CCA create the solutions, but they also help us define the problem and frame the challenge that needs to be addressed. Creating a trusted partnership with consumers starts with saying, “not only don’t we know the answer, but sometimes we don’t know what the right question is. And whatever it is, we can’t solve it without you.”

MARRYING CONSUMERS’ INSIGHT WITH ORGANIZATIONAL METRICS PROVIDES A CLEARER LINE OF SIGHT

Health care is awash with data, but what revolutionized our work at CCA was overlaying a measurement framework onto our journey map to look at measures more holistically. All too often, organizations focus on metrics they are required to report from a regulatory or operational perspective based on their bottom line. Rarely do organizations look at measures that consumers say are most important to them. Doing so turned our thinking upside-down and was integral to our improving our processes and operations.

REIMAGING THE ROLE OF THE CONSUMER – SHARING DECISION-MAKING

Organizational leadership can be reticent to make decisions collaboratively with the people they serve. In our experience, consumers understand that organizations have limits to what they can change, and we advise being transparent about these limitations so that the conversations stay within the pre-determined “guard rails.”

By framing the question as ‘this is the boundary, this is what we have, help us think about how to best use our resources,’ individuals and communities can figure it out together. If consumers are true partners and experts, the payoff of consumer engagement is huge.

Promoting Consumer Partnership through the CACP

Q: Why did CCA found the Center to Advance Consumer Partnership (CACP)?

As a sector, health care has been slow to embrace outreach and engagement as a core strategy and a routine business practice. But the field is hungry for practical solutions and ways to make this effort a core component of strategy – not a siloed effort. Most organizations see the value of consumer partnership, but some struggle with the practical element of how to move a vision to practical action.

The inspiration for CACP emerged out of CCA’s longstanding commitment to a model of care rooted in partnership with members -- we saw an important advantage to relying on “context” rather than just “content” experts when designing and implementing programs and services.

Q: What does CACP offer and what types of clients do you work with?

Much of what we do focuses on strengthening capabilities to integrate and lift up lived experience as a critical source of strategic insights and practical ideas that make organizations more effective. CACP’s work is about creating a wider lens – when organizations routinely look through a broader field of vision, empathy and equity get built into the solutions.

We have had the opportunity to work with innovative leaders across health care and human services sectors that focus on serving those with complex health and social needs.

CACP’s consulting services run the gamut: from helping organizations initially understand current consumer partnership strengths and opportunities to more robust consulting engagements focused on helping organizations build new capabilities, engage consumers as long-term partners, design solutions through a consumer lens, or develop a consumer experience measurement program. Clients can also decide to outsource an entire component of their consumer partnership infrastructure to CACP as some organizations decide to “buy vs. build.”

A few examples of CACP consulting programs:

- **The CACP Readiness Assessment**--provides leaders with insight into how to effectively and efficiently move from the current state to where they want their organization to be in the future. It is a holistic, 360-degree assessment across a set of domains that are foundational to integrating consumers' lived experience into an organization's strategy, culture, and operations.
- **CACP's unique approach to journey mapping**--provides a holistic picture of the consumers' end-to-end experience and all of the touch points that occur along the way. The process of creating and validating a journey map helps staff and leaders gain critical and fundamental insight into those they serve. Building empathy begins to filter into policies, practices, mind-set and culture – ingraining consumer partnership into the organizational DNA.

We believe the co-design process can be a positive, restorative force – especially for people with complex health and social conditions. Not only can a journey map reflect a cross-section of an organization's customers, but it can also reflect the experience of a specific segment of the population, i.e., based on race, ethnicity, language, etc.

CACP's approach was informed by evidence showing that programs designed to benefit disproportionately impacted groups, such as people of color or people with disabilities, often end up benefiting all of society.² We believe that focusing on the experiences of people of color does not diminish the attention that is paid to other populations. Instead, we help organizations design and solve problems for those experiencing the most difficulties, and thereby create an ecosystem that works for everyone.

Our hope is that CACP has created a set of services and supports that is flexible enough to meet the needs of our potential clients – no matter where they are. Every organization has the power and potential to move along the trajectory towards authentic consumer partnership. But that looks different for every organization; there is no one size fits all approach.

Q: What have been some of CACP's biggest learnings to date?

LEVERAGE YOUR EXISTING ASSETS – BUILD ON YOUR STRENGTHS

It is important to recognize that you are not starting from scratch; we believe every organization has tremendous assets and expertise that they can bring to this work. It is

really about finding and tapping into that base of knowledge, skills, and capacity and building on them.

INSIGHT SHOULD BE AVAILABLE IN “REAL TIME” – DESIGN FEEDBACK LOOPS ACCORDINGLY

Too often we have seen organizations being hampered because they lack a system for regularly tapping the expertise, knowledge, and insights of their consumers. If building empathy is the first pillar, then the second would be building infrastructure. Infrastructure is just shorthand for saying that organizations need a routine way to easily engage and gather ongoing, real-time insight and input from consumers.

FOCUS ON THE MOMENTS THAT MATTER – THEY ARE THE MOST IMPORTANT

We believe that empathy is one of the most critical aspects of building an ongoing partnership with consumers. Do not underestimate the power of really trying to understand where people are coming from and what they are confronting on a day-to-day basis.

CREATE TANGIBLE VALUE FOR CONSUMERS

We are beginning to acknowledge that member engagement can be a largely extractive process – you have something I want, i.e., feedback, advice, or the expertise of lived experience. At CACP, we are working hard to create a reciprocal and bi-directional relationship between consumers and the organization.

What was once a “best practice” is becoming the minimum standard. So we need to continue to do things like compensating members for their time and expertise, tailoring outreach and communication vehicles to individual preferences, giving people a sense of being heard, and creating a feedback loop so people know how their input was used. We also need to raise the bar in terms of meeting consumers where they are and lifting up consumer voices.

Conclusion

Based on our conversation with Melinda Karp about CCA and CACP's efforts around authentic consumer engagement and consumer partnership, there are various considerations for MCOs and other key stakeholders seeking to advance member engagement:

² Angela Glover Blackwell, “The Curb-Cut Effect.” Stanford Social Innovation Review, December 2017.

- To develop an organizational culture of authentic member engagement, consider:
 - **Gaining understanding and empathy as a core competency**, using tools like journey mapping to understand members' experiences and build organizational empathy towards members.
 - **Defining intent by methodically assessing impact**, including setting objectives, assessing outcomes, understanding how to measure outcomes, and identifying gaps.
 - **Marrying consumer insights with organizational metrics**, including overlaying a measurement framework onto organizational journey maps to look at measures more holistically.
 - **Ensuring that a diversity of voices** are at the table and lifting up unheard voices.
 - **Tailoring outreach efforts** and creating a safe space for members, given members have differing preferences for how to engage.
 - **Checking assumptions** and ensuring that member voices inform not only potential solutions but also define the problems themselves.
 - **Sharing decision-making** with consumers.
- Lessons learned around working with organizations to advance consumer partnerships include:
 - **Leveraging existing assets** and building on organizational strengths by tapping into the base of knowledge, skills, and capacity.
 - **Designing feedback loops** that allow organizations to tap into the expertise, knowledge, and insights of their consumers in real time by building empathy and establishing infrastructure for routine engagement.
 - **Building empathy** and helping organizations understand where their members are coming from and what they are confronting on a day-to-day basis.
 - **Creating tangible value for consumers** to avoid member engagement being solely an extractive process and encouraging reciprocal and bi-directional relationships between organizations and consumers.

*Interview has been edited for length and clarity.

ABOUT NORC MEDICAID MCO LEARNING HUB

The key goal of the NORC Medicaid MCO Learning Hub is to serve as a source of information, expertise, and best practices to support managed care organizations in moving forward with system reform. NORC and its partner organizations identify, develop, and disseminate promising approaches and emerging opportunities for MCOs to improve the physical health, behavioral health, and social needs of their members.

Your ideas and opinions are important to us. We welcome your feedback on future Medicaid MCO Learning Hub work or programs you are working on to better serve your needs.

We want to hear from you. Please contact us at MCOLearningHub@norc.org to start the conversation or join our distribution list.

www.norc.org/Research/Projects/Pages/medicaid-managed-care-organization-learning-hub.aspx

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