**BUILDING THE CORE MEDICAID CHURN TEAM**



 Purpose

This tool is designed to help states (and/or counties) identify the core state and local staff who will participate in and lead efforts to reduce Medicaid churn. The prompts below will aid your team in understanding who will be needed to accomplish the goals outlined in the [**Goal Setting Tool**](https://bdtrust.org/Goal_Setting.docx). You may also want to spend some time aligning actions with state and/or agency priorities, and identifying the resources needed to carry out the work. Determining the resource needs of a new initiative or a modification to existing processes and/or policies up front can help guide decisions later and create a more efficient and effective process. This document will help your team understand what steps to take and which internal stakeholders to involve.

 Instructions

Complete this planning tool prior to having conversations with state and local agency staff who are responsible for the development and implementation of policy, eligibility and enrollment processes, and data and technology systems. The information gathered in the [**Goal Setting Tool**](https://bdtrust.org/Goal_Setting.docx) should be utilized to inform the identification of state and local staff needed to do this work. The Goal Setting Tool should also be used to gain buy-in as internal staff are engaged to build the Core Medicaid Churn Team. Please note that rows and columns may be added or deleted as needed to suit your needs and this tool may need revisiting as additional personnel needs are identified.

Section 1: **Identifying Leadership**

*Identify the leaders is your agency who are needed to move your Medicaid churn agenda forward. You may want to consider: are there leaders who already recognize this as a priority, or ones who are in a position to move the work forward?*

* *The* ***executive sponsor*** *should have a senior leadership position within the Medicaid agency and possess the power to authorize the activities needs to successfully execute this work. They should also possess an understanding of agency priorities and the value of churn-focused work.*
* *The* ***project lead(s)*** *should be no more than 2-3 the staff members with the capacity and expertise to manage a project of this type. They will be responsible for coordinating the core internal team to ensure continued momentum and alignment with the identified goals.*

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| **Executive Sponsor:** |       |
| **Project Lead(s):** |       |

Section 2: **Defining Goals**

*Identify the goals intended for the core team. These goals should articulate the desired outcomes for bringing a group of internal stakeholders together such as developing a standard metric of churn and reporting structures or implementing processes to increase ex parte renewals. These goals should be revisited often to ensure the group is operating as intended and to allow opportunities for course correction as needed.*

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| **Goal(s) for the Core Team** |
| 1: |       |
| 2: |       |
| 3: |       |

Section 3: **Identifying Other Core Team Members**

*When identifying the core team, consider the state and local staff needed to advance this work. This will likely include data analysts, policy managers, eligibility workers and more. The staff you list below should:*

1. *Have an understanding of how their position and/or expertise within the agency can contribute to understanding the burden of Medicaid churn and its impact on the Medicaid agency and its stakeholders (e.g., providers, beneficiaries, etc.); and*
2. *Be involved in the identification, analysis, implementation, and evaluation of solutions to reduce churn.*

*Additional team members may be added as needed throughout this work. Additional rows should be added as needed.*

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| **Core Team Members** |
| **Contact Information** | **Role** |
| *Consider how this person will contribute to this work. Which goals do they advance? How will they do that? If necessary, you can document conflicts/availability constraints as well.* |
| **Name:**       |       |
| **Title:**       |
| **Agency/Department:**       |
| **Contact Information:**       |
| **Name:**       |       |
| **Title:**       |
| **Agency/Department:**       |
| **Contact Information:**       |
| **Name:**       |       |
| **Title:**       |
| **Agency/Department:**       |
| **Contact Information:**       |

Section 4: **Team Communications**

*Specifying time expectations for engaging in this work and intended communication channels will ensure that all team members have access to the appropriate information, as needed, and can help maintain accountability and sustain progress.*

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| **Team Meetings** |
| **How will meetings be held (e.g. in-person, phone, virtual platform?** |       |
| **How often will the team be together?** | [ ]  Weekly [ ]  Bi-weekly  | [ ]  Monthly [ ]  Bi-Monthly  | [ ]  Quarterly [ ]  OTHER:       |
| **Additional Notes:** |       |

Section 5: **Identify Risks, Constraints and Dependencies (If Known)**

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| **Risks:** |       |
| **Constraints:** |       |
| **Dependencies:** |       |
| **Other Considerations:** |       |

Next Steps

After the core team of internal state and local Medicaid staff has been identified and each member has expressed commitment to the team’s goal of reducing Medicaid churn and understands their designated role, the team should seek to identify the appropriate external stakeholders who should be engaged in these efforts. For assistance identifying and engaging the right stakeholders, please visit the [**External Stakeholder Engagement Tool**](https://bdtrust.org/Stakeholder_Engagement.docx) within this toolkit.

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*The views expressed here do not necessarily reflect the views of the Foundation.*