

# Restructuring a Consortium Model to Effectively Reach and Assist Consumers: AN OHIO CASE STUDY

This case study is part of a series aimed at demonstrating the power of applying essential programmatic efforts to maximize and streamline outreach and enrollment in communities.



## Key themes:

Strategic Planning | Consortium-based | Community Presence | Scheduling Tools | Partnerships

## INTRODUCTION

The Ohio Association of Foodbanks (OAF) is Ohio's largest charitable response to hunger, representing Ohio's 12 Feeding America foodbanks and 3,600 hunger relief agencies. The association's mission is to provide food and other resources to people in need and to pursue areas of common interest for the benefit of these communities. OAF recognizes that hunger is a symptom of poverty. Ensuring that people have access to available resources is necessary to reduce hunger. OAF has a long history of administering outreach and enrollment programs that connect neighbors with benefits such as the Supplemental Nutrition Assistance Program (SNAP), Home and Energy Assistance Program ( HEAP), and health insurance through Medicare, Medicaid, and the Federally-facilitated Marketplace (FFM).

OAF was awarded a cooperative agreement to serve as a Navigator program for the FFM from 2013 to 2017. They reengaged in 2021, operating an expanded consortium leveraging their experience and presence in the local communities of Ohio.

## CHALLENGE

As OAF worked to rebuild their consortium in 2021, they identified a need to optimize reach and enrollment across a large state with varied needs from community to community. OAF chose to focus their role as a Navigator grantee on providing both direct enrollment support and administrative support to qualifying organizations that had community presence and reach within their region.

## KEY FINDINGS

OAF leveraged their community organizing experience and capacity to administer food programming and coupled that with enrollment in health coverage because they understood Ohioans depended not only on adequate, nutritious food for a healthy life, but also on reliable access to affordable health coverage and care. Their deep bench of expertise across their consortium, combined with deliberate preparation and planning, has equipped them to reestablish their Navigator programming and expand their community presence to serve consumers across the state of Ohio.

## Key Findings, continued

OAF's approach to rebuilding their Navigator consortium allows for:

-  **Strengthened Organizational Structure:** Strategic planning processes inform the creation of consistent standard operating procedures to promote continuous quality improvement and compliance through training and support.
-  **Targeted Outreach:** OAF streamlines their consumer calls to action using key messages that culminate in an appointment with a Navigator to engage consumers at the outset and commit the consumer to follow up and to enroll in coverage. OAF also leverages publicly available data to strategically reach consumers likely to qualify for qualified health plan (QHP) enrollment. This targeted approach, coupled with a thorough understanding of eligibility for public benefit programs, improves efficiencies across the consortium.
-  **Intentional Community Engagement:** The Navigator workforce within the consortium must prioritize building community awareness through speaking engagements, presence at local events, and partner visits to foster trust and recognition within the community.
-  **Collaborative Branding and Enhanced Community Trust:** Each member of the consortium highlights their role in the consortium and agrees to integrate shared branding to foster name recognition and community trust. Along with the consortium's appointment setting approach, the shared branding directly contributes to the program's success.
-  **Workforce Retention Strategies:** OAF ensures operational consistency within routine workflows to support year-round enrollment through comprehensive training protocols and standard operating procedures.

## SOLUTIONS AND RESULTS

### 1. Strategic Planning Sessions Strengthen Organizational Structure

OAF engaged in strategic planning with leadership from each subrecipient when they returned with renewed funding and needed to strengthen the role of their subrecipients. The association provided backbone support in grant administration to maximize the outreach and enrollment efforts of their consortium members. They also integrated workforce capacity, standard operating procedures, and required use of appointment setting as a call to action to engage consumers. The goal of the strategic planning process was to broaden OAF's communication channels to expand input across leadership. The planning efforts fostered collaboration across the subrecipient organizations and shifted the consortium culture from compliance-focused individual effort to collaborative thought partnership.

As the prime recipient of the Navigator award, OAF provides direct service and monitors subrecipients

for performance and compliance. OAF has nearly 20 years of experience in managing federal grants, executing subrecipient agreements, and overseeing subrecipients to achieve project outcomes. They create opportunities for ongoing training and communication with subrecipient leadership on topics such as invoicing and reporting, media releases, and Marketplace updates. OAF also hosts office hour sessions for Navigators to discuss outreach and enrollment best practices, talk through complex cases, and seek technical assistance on relevant policies. All these factors contribute to their ability to provide continuous quality improvement in the program.

As a result of the strategic planning sessions and work planning, Navigator expectations are now embedded in the program's infrastructure, formalized and monitored through OAF's bi-monthly check-ins with subrecipients. Examples include budget and program goal progress reports, outreach engagement plans, and staffing updates, all ensuring accountability in the program. OAF sends monthly reports to all subrecipients and monitors progress toward enrollment numbers. Bi-monthly check-in meetings are held with subrecipi-

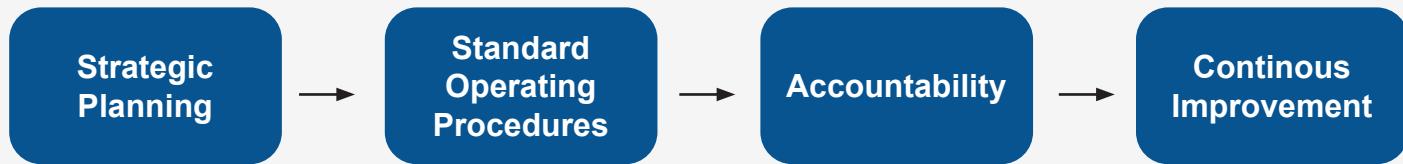
ent leadership to comprehensively review their performance, address any issues, evaluate workflow gaps, and plan program support strategies. Meetings focus on collaborative improvement and include multiple layers of communication related to reporting activity.

By consistently measuring and reporting progress, accountability becomes an integral part of daily operations of the Navigator teams, resulting in continuous improvement across the consortium.

“What you measure is what ultimately ends up happening.”

Grace Wagner  
Director, OAF Navigator Consortium

### Strategic Planning Leads to Program Longevity



## 2. Understanding the Economic Needs of Communities and Leveraging Data Resources to Meet Program Goals

OAF has extensive experience with enrollment in public programs and understands the importance of comprehending the eligibility rules, which is required by the Navigator program per federal regulation. Understanding the details of eligibility is fundamental to effectively using data to target populations for enrollment.

### Using Data to Drive Marketplace and Medicaid Enrollments Year-Round

The consortium utilizes various public data to identify QHP-eligible consumers and direct their outreach across the state. These data sources include census-tract level population characteristics, U.S. Postal Service data, and ALICE (Asset Limited, Income Constrained, Employed) reports. ALICE households earn income above the federal poverty level but still cannot afford basic expenses. OAF uses targeted messaging through its outreach efforts and marketing campaign, directing individuals to their outreach campaign and statewide helpline.

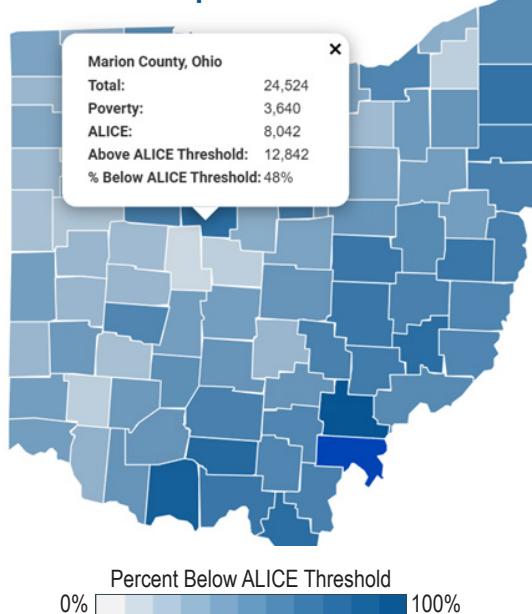
Consumers who lose health insurance outside of Open Enrollment may be eligible for a Special Enrollment Period (SEP). Using public data from the Ohio Department of Job and Family Services, OAF identifies companies announcing layoffs and closures and shares referral details with them to assist impacted employees.

## 3. Integrated Platforms Promote Consortium Cohesion and Community Recognition

OAF created a consortium model that was distinct from their existing association brand to manage the Navigator program. The consortium has its own promotional toolbox, including web-based tools, shared tested messages, a robust media campaign (e.g., television and radio placements, newspaper ads), billboards, and paid social media advertisements.

By incorporating subrecipient logos in the shared branding, OAF strengthened outreach and rebuilt visibility and trust with consumers and the community.

### Example of ALICE data



## Materials from OAF's Promotional Toolbox

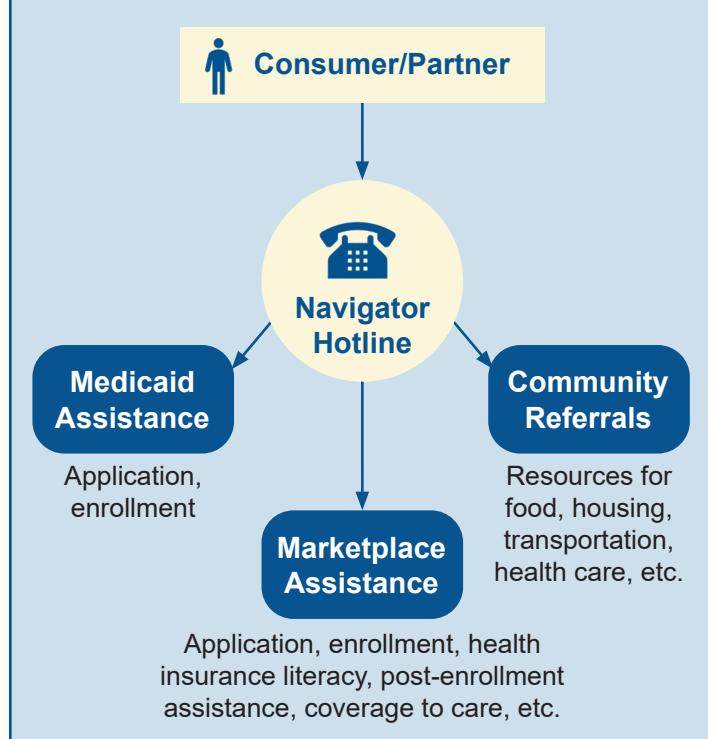


To ensure the scheduling system worked smoothly across the consortium, OAF trained Navigators to use the system and required them to update their schedules on the platform daily. This process maximizes appointment availability for consumers while creating accountability tools for Navigator program oversight.

## 4. Reestablishing Strong Community Presence Achieved Through Consistency

OAF emphasized the significance of relationship building to Navigators within the consortium, recognizing that reestablishing relevance requires continuous visibility across the state. Navigators are encouraged to attend local events, present to hospital financial teams, and make regular contact with Federally Qualified Health Centers (FQHCs) and other community stakeholders. By encouraging tailored and persistent outreach — showing up and listening year-round, not just during Open Enrollment — OAF equips Navigators to create a functional referral network, proving their long-term commitment and gaining community buy-in. When talking with potential referral partners, OAF emphasizes a “no wrong door” approach in which both consumers and partners can call a hotline operated by Navigators who can answer questions, help schedule an appointment, or direct consumers to other relevant community resources.

### “No Wrong Door” Approach



The consortium also focused on the need to use appointment scheduling processes for consumers to effectively coordinate with assisters across the state. OAF integrated a centralized scheduling platform on the consortium website, enabling universal appointment scheduling for Navigators, referral partners, and consumers to connect by location and language.

Presentations to hospital staff resulted in significant patient referrals for the Navigator program. While hospital staff who managed patient intake and eligibility processes (including Medicaid applications) could identify uninsured patients, they were not trained or resourced to assist with Marketplace applications. After education from Navigators, hospital financial advocates started referring patients using the consortium website tools. These tools include a hotline answered by one of the subgrantees, a “request for help” form routed to local assisters based on zip code, and direct appointment scheduling through a link.

## 5. Workforce Retention and Support: Strategies for Building Cohesion

OAF took the initiative to develop a framework for balancing year-round outreach and enrollment activities. This included clear prioritization guidance and expectations for Navigators, which helped to re-align the workforce with program goals and ensured role clarity and community presence. OAF set expectations around how Navigators spend their time by prioritizing commonly reported activities (e.g., attending scheduled appointments, tabling at community events, establishing referral partners, etc.) that led to more QHP enrollments. OAF also established training protocols and standard operating procedures to ensure operational consistency within routine workflows.

The consortium focused on reducing turnover by:

1. Clarifying roles and expectations.
2. Offering regular professional development opportunities.
3. Including the Ohio All-Assister Alliance, which is a collaboration of local and regional organizations that staff licensed Navigators and/or Certified Application Counselors (CACs).
4. Hosting bi-monthly calls for knowledge sharing and relationship building.

These efforts built and retained an experienced workforce with strong internal and external relationships.

## CONCLUSION

By strengthening organizational structure, targeting consumer outreach, consistently engaging communities, and streamlining branding and appointment scheduling, OAF rebuilt their program to increase referrals and enrollments.

This case study demonstrates how an experienced consortium with strategically aligned subrecipients and partners can achieve buy-in and increase awareness of Marketplace assistance in communities.



### Questions for Navigator Programs for Replication and Innovation

1. How does your program use data to enhance targeted outreach and maximize enrollments in your area?
2. What are your processes to schedule consumer appointments effectively and efficiently?
3. How are your strategic partnerships aligned with your proposed outreach and enrollment goals?
4. What approaches or systems do you employ to enhance collaboration and promote access to Navigator assistance?
5. What training and educational supports are in place to promote quality improvement in your program?

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