

# NAVIGATION EVALUATION SUMMARY



QUANTUM  
FOUNDATION

# INTRODUCTION

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Over the past 5 years, Quantum Foundation has granted approximately \$3 million to support navigation efforts in Palm Beach County; grants ranged from \$50,000 to \$350,000 with an average grant size of \$150,000. To assess the impact of those investments, the foundation commissioned this evaluation. The evaluation included a review of 19 grant applications, analysis of interim and final grantee reports from those 19 grants, 11 qualitative interviews with current and past grantees, and a small group session with 12 current and past grantees.

# BACKGROUND AND CONTEXT

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Patient navigator or patient advocacy services can reduce healthcare disparities and increase access to care, improve patient outcomes for a specific illness or chronic disease, or help patients effectively negotiate the healthcare system (AMA, n.d.). For this report, the term “navigation” includes helping individuals obtain a variety of benefits, helping individuals navigate the healthcare system, and/or helping eliminate barriers to care.

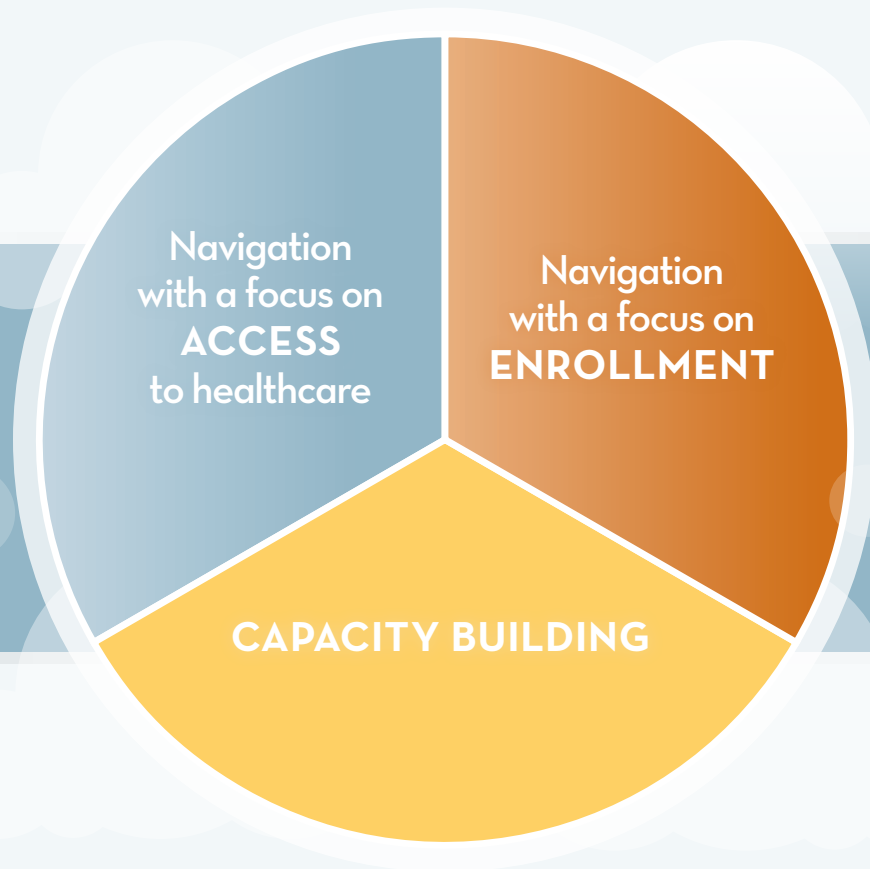
Over the past five years, Quantum Foundation has invested in both direct service navigation and efforts to build the capacity of the navigation system. Direct services navigation included services such as outreach, screening, enrollment in benefits and health insurance, referral to health services, and assistance with removing legal barriers to enrollment, insurance, and care. Some grants had an additional focus of ensuring clients had a medical home and providing education on the effective use of healthcare. These direct service navigation grants served various

populations and geographic areas, and took place in a variety of organizations from clinics to community-based nonprofits.

Efforts to build the capacity of the navigation system included investing in Navigate PBC, One-e-App, and Enroll Palm Beach. In order to improve navigation of the health and human services system, Navigate PBC provides professional development and resources for navigators and promotes networking among navigators. One-e-App maximizes access to and participation in federal, state and local programs through the use of a simplified and efficient single application process. Enroll Palm Beach and Treasure Coast is a collaborative effort by 36 agencies to provide access to Affordable Care Act health insurance, coordinate outreach and navigation services, and provide a common portal for consumers.

# QUANTUM'S 3 STRATEGY AREAS

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It is difficult to compare strategies as each grant was unique in its goals and the population served. Interviews suggest that investing in multiple strategies was important to specific client populations.

## ENROLLMENT

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***“I think it was incredible in that we were able to significantly enroll folks that were eligible but not currently enrolled in a host of benefits.”***

Looking at direct service grants with a focus on enrollment, those with the highest numbers focused on outreach and enrollment in a targeted low-income geographic area. This is not to suggest that other grants were not successful; while not enrolling a high number of clients, grants served specific populations with multiple barriers, provided additional services, or focused on healthcare access.

## ACCESS

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***“[The impact was] doing additional assessment and working with the individual to come up with solutions, and then for the person where it becomes complicated there is additional advocacy. So we have advocacy here for those people who are struggling with the health system.”***

Quantum looked to improve the health and well-being of low-income and other vulnerable populations by resolving unmet legal needs and removing legal barriers that impede health and access to healthcare. Quantum funded projects

that integrated legal professionals into the healthcare team at local community health centers. This funding helped to bridge patient care with targeted legal intervention to create systemic institutional change. 211’s Elder Crisis Outreach program provided a variety of intervention and navigation services to our most vulnerable population, including telephone and in-home counseling, suicide evaluation, advocacy, linkage, screening and enrollment support for basic needs and healthcare benefits.

## CAPACITY BUILDING

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***“Five or ten years ago or so ago organizations and agencies weren’t necessarily talking about how they’ve worked together around navigation. People are really coming to the table, not as concerned with turf issues, but instead, really wanting to work together for the greater good.”***

Capacity building efforts had the highest number of enrollments. As not all the organizations reporting were funded through Quantum however, those enrollment are not directly attributable to Quantum funding but were likely influenced by it. For example, Quantum funded One-e-App, and prior

evaluations documented that One-e-App positively impacted client benefits. As of June 2015, almost 12,000 clients were screened through One-e-App and were found eligible for more than 34,000 programs. Staff estimate Palm Beach residents have accessed \$29 million in benefits since the inception of the program through December of 2014.

Supported by Quantum's funding of the Health Council of Southeast Florida, Enroll Palm Beach, South Florida residents signed up for health insurance offered under the Affordable Care Act at some of the highest rates in the nation.

## **SunSentinel**

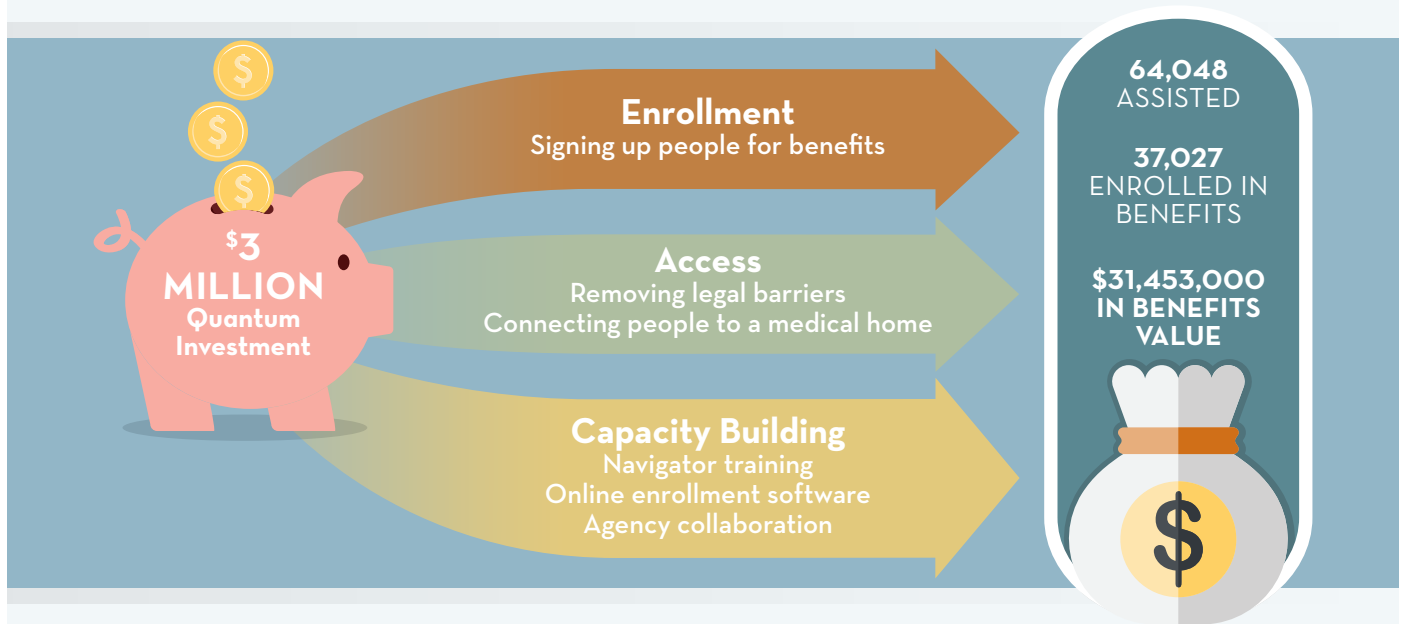
"Six of the 40 zip codes with the highest enrollment rates in the country were in Broward and Palm Beach counties. Those areas are home to large numbers of non-English speakers who were the focus of outreach efforts by federally funded health insurance 'navigators'. Three zip codes in Palm Beach County saw 12 percent or more of its residents enrolled: 33344, encompassing a section of eastern Delray Beach west of South Dixie

Highway; 33403, comprising Lake Park and Palm Beach Gardens; and 33435, which is mostly Boynton Beach." Hurtibise, Ron. Obamacare Enrollment High in South Florida. N.p.: Sun Sentinel, 2015. Print.

## **South Florida BUSINESS JOURNAL**

"As of Jan. 30, 637,514 people in Miami-Fort Lauderdale-West Palm Beach selected or were automatically enrolled in a healthcare plan, according to the release. Across the U.S., South Florida is followed by Atlanta-Sandy Springs-Roswell with 296,857 individuals and Dallas-Fort Worth-Arlington with 277,015 individuals." Lincoff, Nina. South Florida tops nation for health insurance enrollment. N.p: South Florida Business Journal, 2015. Print.

# WHAT WAS THE IMPACT OF OUR OVERALL NAVIGATION FUNDING?



*“I think that they [Quantum] have really called attention to the importance of navigation because I think sometimes we put so much emphasis on the provision of direct services that we lose sight of people’s access to those services.”*

- Grantees were able to attract new clients and build relationships with them.
- The impact of capacity building efforts included building collaborations and partnerships and increasing efficiency and effectiveness of navigation.
- As of June 1, the capacity building and direct services grants served 64,048 people and enrolled people in 37,027 benefits, including 25,531 in health insurance, which has an estimated \$31,453,000 in benefits value.
- Grantees noted three impacts: shining a light on navigation, improving the lives of families in the community, and increasing collaboration. Interviews suggest that investing in multiple strategies (i.e., outreach, referral, enrollment, advocacy, and access) was important to the success of the investment.

See full navigation report for methodology.

# WHAT'S NEXT FOR OUR NAVIGATION EFFORTS IN PALM BEACH COUNTY?

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**This section provides feedback from grantees regarding sustainability of their efforts as well as how to have a greater impact on client health.**

## HOW WILL THE WORK BE SUSTAINED?

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*“Quantum increased awareness of navigation in the community and also helped the grantees to understand how badly the community needed assistance in navigating. Grantees also noted that Quantum’s investment sometimes led to leveraging other funding for navigation and often positively impacted the credibility of the organization when pursuing other funds.*”

Grantees whose grant had ended by the time of the interview reported varying success in sustaining efforts. Some were managing to do so and reported, “It’s included in our operational budget. It’s now attached to each staff member as an additional responsibility that they have. It

was actually a significant resource to the people we’re serving.” Others provide a reduced level of service. Among those with grants still in progress, a few noted that it would be operationalized within the agency budget, but others noted they would need to obtain additional grant funding: “We’re hoping to attract other funders by showing the impact that it’s had.”

A few interviewees noted the need for a pool of funding from multiple funders committed to the issue. One wished for “more collaboration and more funders being willing to look at the landscape and invest dollars in a pool.”



# CONCLUSIONS AND RECOMMENDATIONS

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- There is a need to educate clients about how to use health insurance. Interviewees noted that the lack of knowledge about how to use insurance was the biggest issue in impacting clients' health.
- The community needs to address sustainability for navigation. Grantees reported varying success in sustaining their efforts once their grant was completed. Some had enjoyed success, while others now provide a reduced level of service. Among those with grants still in progress, a few noted that it would be operationalized within the agency budget, but others noted they would need additional grant funding.
- There is an opportunity for collaboration around the broader field of navigation (versus collaborating around navigation solely to enroll people in the marketplace).