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Where you choose health coverage

FY 2025 Navigator Grant Program Applicant Webinar

January 29, 2024

Thank you for joining our Fiscal Year 2025 Navigator Grant Program webinar.

My name is Christina Wessel, and I am the Senior Director of Partner Relations at MNsure. Later in the presentation you will also hear from John Azbill-Salisbury. He is the Consumer Assistance Program Operations Manager.

The purpose of our webinar today is to provide more information about the Request for Proposals for the Navigator grant program, who is eligible to apply, what are the expectations of the grant program, and how to submit an application.

Agenda

- Grant RFP overview
- Application process
- Evaluation and selection process
- Grantee expectations
- How to submit an application through Foundant
- Questions

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We will cover the following topics during this webinar:

- An overview of RFP, including the goal of the grant program, who is eligible to apply and critical dates in the timeline
- A detailed description of the application sections
- The evaluation and selection process
- The expectations for those selected as grantees
- And, finally, we will explain how to submit an application through Foundant

We will then answer questions that have been submitted through the chat or emailed to navigatorgrants@mnsure.org.

Grant RFP Overview

I will begin with a brief overview of the request for proposals.

Navigator Funding Opportunities

- The goal of MNsure’s Consumer Assistance Program is to ensure all Minnesotans are connected to affordable and comprehensive health insurance coverage.
- Navigator agencies may receive financial support for participating in this work through two possible sources:
  - All navigator agencies receive per enrollee payments for successfully assisting a consumer with applying for Medical Assistance, MinnesotaCare or a qualified health plan.
  - In addition to per enrollee payments, agencies may apply for a grant to support outreach and enrollment efforts targeting uninsured populations, especially those communities that have historically experienced disparities and/or face barriers to enrollment.

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The goal of MNsure’s Consumer Assistance Program is to ensure all Minnesotans are connected to affordable and comprehensive health insurance coverage.

Navigator agencies may receive financial support for participating in this work through two possible sources:

- All navigator agencies receive per enrollee payments for successfully assisting a consumer with applying for Medical Assistance, MinnesotaCare or a qualified health plan.
- In addition to per enrollee payments, agencies may apply for a grant to support outreach and enrollment efforts targeting uninsured populations, especially those communities that have historically experienced disparities and/or face barriers to enrollment.

The focus of this webinar is the request for proposals for the grant program that was released on Wednesday, January 17.

FY 2025 Navigator Grant Program

- The priority of the FY 2025 Navigator Grant Program:
  - Support a professional workforce of experienced navigators with a year-round commitment to providing application and renewal assistance for public and private health insurance options.
  - Focus on assisting populations that evidence shows are disproportionately uninsured, experience disparities in health outcomes, or face barriers to enrolling in coverage.
- Approximately $4 million in funding; maximum award of $550,000 per fiscal year.
- Applications must be submitted by 1 p.m. Central time on February 22, 2024.
- Grants will begin July 1, 2024 and end June 30, 2025. At MNsure's sole discretion, grant contracts may be extended for an additional year, not to exceed a total contract term of two years.

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The priority of the fiscal year 2025 Navigator Grant Program is to support a professional workforce of experienced navigators with a year-round commitment to providing application and renewal assistance for public and private health insurance options.

The focus is on assisting populations that evidence shows are disproportionately uninsured, experience disparities in health outcomes, or face barriers to enrolling in coverage.

MNsure anticipates approximately $4 million in funding will be available, with a maximum award of $550,000 per fiscal year.

Applications must be submitted by 1 p.m. Central time on February 22, 2024.

Grants will begin on July 1, 2024 and end June 30, 2025. At MNsure's sole discretion, grant contracts may be extended for an additional year, not to exceed a total contract term of two years.

Eligible Applicants

- To be eligible to apply, an agency must:
  1. be a public, tribal, private for-profit or nonprofit agency; and
  2. have a MNsure navigator contract that is in good standing as of the publication of this RFP.
- Individuals are not eligible to apply.
- During Stage 2 of the evaluation process, applicants will also be scored on whether they meet minimum qualifications. The minimum qualifications will be covered later in this webinar.

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To be eligible to apply, an agency must:

- First, be a public, tribal, private for-profit or nonprofit agency; and
- Second have a MNsure navigator contract that is in good standing as of the publication of this RFP.

Individuals are not eligible to apply.

Please note that during Stage 2 of the evaluation process, agencies will also be scored on whether they also meet some minimum qualifications. The evaluation process and minimum qualifications will be covered later in this webinar.

Grant Structures

- Single agency: An agency with no paid partners receiving funds from the grant.
- Paid partnership: A lead agency with one or more partners that receive grant funds.
  - The lead agency in a paid partnership must meet all eligibility criteria and the minimum qualifications.
  - Paid partners must be public, tribal, private for-profit or nonprofit agencies.
  - Paid partners do not need to have a navigator contract or meet the minimum qualifications.
- Each grant will be awarded to a single agency. In a paid partnership, the grant will be awarded to the lead agency.
- An individual agency can only receive grant funds from one grant.

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There are two potential grant structures.

There is a single agency, which is an agency with no paid partners receiving funds from the grant.

MNsure also welcomes multi-agency collaboration. So, a second potential structure is a paid partnership, where there is a lead agency with one or more partners that receive funds from the grant.

The lead agency in a paid partnership must meet all eligibility criteria and minimum qualifications.

Paid partners in a paid partnership must be public, tribal, private for-profit or nonprofit agencies. However, paid partners do not need to have a navigator contract and are not required to meet the minimum qualifications.

Each grant will be awarded to a single agency. In a paid partnership, the grant will be awarded to the lead agency.

An individual agency can only receive grant funds from one grant.

Questions

- Questions should be emailed to navigatorgrants@mnsure.org by 3 p.m. Central time on Wednesday, February 7, 2024.
- Questions sent to other email boxes, such as the Assister Resource Center or individual staff member email boxes will not be responded to.
- Contact regarding this RFP with any MNsure personnel not following this process could result in disqualification.
- Questions will be addressed in writing and posted on the MNsure Funding Opportunities webpage no later than February 16, 2024.
- After 3 p.m. on February 7, MNsure will only respond to questions regarding technical issues or requests for minimum qualification scores.

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It is the policy of MNsure to assist applicants with their inquiries during the application process.

Applicants' questions regarding this RFP should be emailed by 3 p.m. Central Time on Wednesday, February 7, 2024. All questions must be emailed to navigatorgrants@mnsure.org.

Questions sent to other email boxes such as Assister Resource Center email box or individual staff member email boxes will not be responded to.

Contact regarding this RFP with any MNsure personnel not following the process described here could result in disqualification.

Questions will be addressed in writing and posted on the MNsure Assister Funding Opportunities webpage no later than February 16, 2024.

After 3 p.m. on February 7, MNsure will only respond to technical issues or requests for minimum qualification scores.

Upcoming Key Dates for RFP Process

- February 7, 3 p.m. Central time: Deadline for submitting questions
- February 16: Answers to all questions posted to the MNsure Assister Funding webpage on or before this date, including:
  - Written responses to all questions asked during the webinar
  - All questions submitted via email by the February 7 deadline
- February 22, 1 p.m. Central time: Deadline for submitting RFP responses
  - DO NOT WAIT UNTIL THE LAST DAY TO START YOUR ONLINE APPLICATION!
  - Late responses will not be accepted.

I want to call your attention to key upcoming dates in the RFP process.

First, as we just covered, February 7, at 3 p.m. Central time is the deadline for submitting questions regarding the RFP.

MNsure will post written answers to all questions on the Assister Funding Opportunities webpage on or before February 16. MNsure will post answers to all questions submitted during the webinar or sent to navigatorgrants@mnsure.org by the deadline. MNsure will post generalized answers while maintaining the confidentiality of the potential applicant and any specifics about their proposal.

And most important of all, the deadline for submitting RFP responses is Thursday, February 22 at 1 p.m. Central time.

Do not wait until the last day to start your online application! If you experience any technical issues while submitting your application, those can be submitted to navigatorgrants@mnsure.org after the February 7 question deadline. However, please be aware that we will have limited ability to respond to technical issues on the deadline day and late responses will not be accepted.

How to Apply

Next we are going to go into more detail on the application sections.

Application Process

- Agencies must submit their application online through Foundant.
  - The application requires completing text fields and uploading documents.
  - A template of the application is available in the Appendix of the RFP which is posted on the Assister Funding Opportunities webpage under “Navigator Grant Request for Proposals and Required Documents.”
- Applicant responses to some sections will be scored by a review committee.
- MNsure encourages responders to allow for the time necessary to ensure successful submission of the proposal.
- Technical questions can be submitted to navigatorgrants@mnsure.org. However, technical questions submitted on February 22 may not be responded to prior to the deadline.

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All applications must be submitted online through a program called Foundant. Applicants will need to complete text fields and upload documents. We will cover that process in more detail later in the webinar.

A template of the application is available in the Appendix of the RFP which is posted on the Assister Funding Opportunities webpage under the heading “Navigator Grant Request for Proposals and Required Documents.”

The applicant’s responses to some sections of the application will be scored by a review committee. We will also cover the evaluation process in more detail later in the webinar.

Above all, we strongly encourage responders to allow the time necessary to ensure successful submission of the proposal. There are several steps to this process. If you encounter technical issues, you can submit questions to navigator grants at MNsure dot org. However, if you wait until the last minute and have technical issues on February 22, we may not be able to respond prior to the deadline.

Required Application Sections

- Applicant Information (not scored)
- Statement of Focus (5% of total score)
- Connection to Statement of Focus Population (10% of total score)
- Current Agency Activities (30% of total score)
- Grant Objective and Strategies (30% of total score)
- Data Collection (15% of total score)
- Budget and Financial Management (10% of total score)
- Letters of Support for Paid Partnerships (not scored)
- Required Statements (not scored)

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The application is broken into several required sections:

Applicant information section collects general information about the agency submitting the application and whether there are any paid partners. This section is not scored.

The scored sections of the application are the statement of focus, 5% of total score, connection to the statement of focus population, 10% of total score, current agency activities, 30% of total score, grant objective and strategies, 30% of total score, data collection, 15% of total score, and budget and financial management, 10% of total score.

Letters of support are required for paid partnerships, although this section is not scored.

And finally there are six required statements – these are the Attachments A through F. These are required but are not scored.

I will walk through all of these sections in more detail.

Applicant Information (Not Scored)

- Provide name and contact information for the contract representative and main contact for the grant application
- Provide a Minnesota Tax ID, State of Minnesota Vendor Number and a Federal Data Universal Number (DUNS)
- Provide type of agency to verify eligibility to apply
- Certify that the agency in good standing with the Minnesota Secretary of State
- Provide total grant amount requested
- List any paid partners
- List individuals involved in preparing the proposal to identify potential conflicts of interest

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The first section of the application gathers basic information about the applicant and any paid partners. As I just mentioned, this section is not scored.

The applicant will need to provide the name and contact information for the contract representative and a main contact for the grant application, if it is different than the contract representative.

The applicant will also be asked for a Minnesota Tax ID, a State of Minnesota Vendor Number and a Federal Data Universal Number, or DUNS.

The applicant will be asked what type of agency it is to verify eligibility to respond to the RFP.

And they must also certify that the agency in good standing with the Minnesota Secretary of State.

This section asks for the total grant amount that will be requested.

If it is a paid partnership, the applicant must list any partners that will receive funds from the grant.

And finally, the applicant must list all individuals involved in preparing the proposal to assist with identifying potential conflicts of interest.

Statement of Focus

- Applicants are required to identify a population or populations that will be the focus of the grant. This is the “Statement of Focus” or “SOF population.”
- The SOF population does NOT need to include every population the agency serves.
- Applicants must provide evidence that the SOF population (or each population, if multiple are identified) experiences one or more of the following:
  - High rates of uninsurance
  - Barriers to obtaining and maintain coverage
  - Disparities in health outcomes
- Specify the geographic area that will be served by the grant.

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A key goal of MNsure’s navigator grant program is to build a strong navigator infrastructure to reach uninsured Minnesotans and those facing barriers to obtaining or maintaining health insurance coverage.

Therefore, the first scored section has the applicant identify the population or populations that will be the focus of the grant. For the rest of the application, the population or populations identified here will be referred to as the “Statement of Focus” or SOF population.

The Statement of Focus does NOT need to include all the populations served by the agency. It should be limited it to the population or populations that will be the focus of the objective and strategies of the grant proposal.

Applicants must provide evidence that the SOF population experiences one or more of the following:

- High rates of uninsurance
- Barriers to obtaining and maintain coverage
- Disparities in health outcomes

If the applicant identifies multiple populations, evidence must be provided for each of the populations.

Finally, the applicant must specify the geographic area that will be served by the grant.

Statement of Focus: Scoring

- An excellent response will:
  - Clearly identify one or more populations as the specific population(s) that will be the focus of the grant.
  - Provide statistical data or other substantial evidence for each of the populations identified that demonstrates the population experiences high rates of uninsurance, barriers to obtaining/maintaining coverage; and/or disparities in health outcomes.
  - Define a specific geographic area that will be served by the grant.
- This section weighted as 5% of the total score.
- Additional information is on page 7 of the RFP.

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An excellent statement of focus will:

- Clearly identify one or more populations as the specific population(s) that will be the focus of the grant.
- Provide statistical data or other substantial evidence for each of the populations identified that demonstrates the population experiences high rates of uninsurance, barriers to obtaining/maintaining coverage; and/or disparities in health outcomes.
- And define a specific geographic area that will be served by the grant.

This section of the application will be weighted as 5% of the total score.

Additional information on the Statement of Focus section is on page 7 of the RFP.

Connection to SOF Population

- The applicant will need to provide evidence of strong, established connections to the SOF population:
  - Includes length of time, relevant services and/or special skills
  - Leadership and staff that represent the community.
- Preference will be given to agencies that can offer in-person assistance within a reasonable distance within the geographic area.
- If the SOF population includes more than one population, the applicant is expected to demonstrate connections to all the identified populations.
- If the grant is a paid partnership, the application should explain the connections the paid partners have to the SOF population.

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In the next section of the application, the “Connection to the statement of focus population,” the applicant will need to provide evidence of strong, established connections to the SOF population. This could be demonstrated by length of time serving the population, relevant services or special skills. This also includes having leadership and staff that represent the community.

Preference will be given to agencies that can offer in-person assistance within a reasonable distance within the geographic area.

If the Statement of Focus population includes more than one population, the applicant is expected to demonstrate connections to all the identified populations.

And if the grant is a paid partnership, the application should explain the connections the paid partners have to the SOF population.

Connection to SOF Population: Scoring

- An excellent response will:
  - Present evidence that the agency, or lead agency and paid partners, have well-established connections to the SOF population.
  - Have leadership and staff that are representative of the SOF population.
  - The response includes information supporting connections to all identified populations.
  - Explains how the grant will serve the SOF population within the full geographic area.
  - Specifies where and how in-person assistance will be offered.
- This section weighted as 10% of the total score.
- Additional information is on pages 7 and 8 of the RFP.

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For this section, an excellent response will:

- Present evidence that the agency, or lead agency and paid partners, have well-established connections to the SOF population, demonstrating both length of time, relevant services and/or special skills.
- Demonstrate the agency, or lead agency and paid partners, have board members, agency leadership and staff that are representative of the SOF population.
- If the SOF population includes multiple populations, the response includes information supporting connections to all identified populations.
- Explains how the grant will serve the SOF population within the full geographic area.
- And specifies where and how in-person assistance will be offered.

This section of the application will be weighted as 10% of the total score.

Additional information on this section is on pages 7 and 8 of the RFP.

Current Agency Activities

- Applicants are expected to have established processes for assisting the SOF population with applying for coverage, enrolling in private plans and managing casework to support maintaining coverage.
- Applicants must also demonstrate proven in-reach and outreach strategies for the SOF population.
- Preference will be given to agencies with one or more navigators devoted at least half-time (16 or more hours per week) year-round to MNsure activities.

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In the next section, agencies will be asked to describe their current activities for supporting the SOF population. Applicants are expected to have established processes for assisting the SOF population with applying for coverage, enrolling in private plans and managing casework to support maintaining coverage.

Applicants must also describe in-reach and outreach strategies that are effective at connecting with the SOF population

Preference will be given to agencies with one or more navigators devoted at least half-time (16 or more hours per week) year-round to MNsure activities.

Current Agency Activities: Scoring

- An excellent response will:
  - Describe current outreach activities that are specific to connecting with the SOF population.
  - Describe current comprehensive application support activities to help the SOF population get an eligibility determination.
  - Explain how they help eligible consumers with enrolling in a private health plan.
  - Describe current case management support to help the SOF population understand their coverage and maintain correct eligibility.

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For this section, an excellent response will:

- Describe current outreach activities that are specific to connecting with the SOF population.
- Describe current comprehensive application support activities to help the SOF population get an eligibility determination.
- Explain how they help eligible consumers with enrolling in a private health plan, and
- Describe current case management support to help the SOF population understand their coverage and maintain correct eligibility.

Current Agency Activities: Scoring (continued)

- An excellent response will (continued):
  - Describe how the agency helps the SOF population maintain coverage through renewal periods.
  - Name one or more certified navigators that are currently dedicated at least half-time (16 or more hours per week) to MNsure outreach and enrollment activities year-round.
  - For a paid partnership, includes the current activities of all paid partners.
- This section weighted as 30% of the total score.
- Additional information is on pages 8 and 9 of the RFP.

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An excellent response will also:

- Describe how the agency helps the SOF population maintain coverage through renewal periods.
- Will name one or more certified navigators that are currently dedicated at least half-time (16 or more hours per week) to MNsure outreach and enrollment activities year-round.
- If it is a paid partnership, the application will also include the current activities of all paid partners.

This section of the application will be weighted as 30% of the total score.

Additional information on this section is on pages 8 and 9 of the RFP.

Grant Objective and Strategies

- Applicants must provide an objective setting how many individuals from the SOF population will gain or maintain health insurance coverage during the grant period.
- Applicants must list strategies for helping the SOF population through the full life cycle of coverage, including:
  - Learning about health insurance options,
  - Submitting an application that results in eligibility,
  - Helping eligible consumers enroll in private health insurance coverage,
  - Responding to notices and reporting changes in circumstances, and
  - Completing renewals.

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In the next section of the application, agencies will be asked to provide an objective for their grant and list the strategies for achieving that objective.

The objective will set how many individuals from the statement of focus population will gain or maintain health insurance coverage during the grant period.

To achieve that objectives, applicants must list strategies for helping the statement of focus population through the full life cycle of coverage, including:

- Learning about health insurance options,
- Submitting an application that results in eligibility,
- Helping eligible consumers enroll in private health insurance coverage,
- Responding to notices and reporting changes in circumstances,
- And completing renewals.

For example, an applicant's objective might be that 400 recent refugees/immigrants settling in Northeast Minnesota will obtain or maintain health insurance coverage.

For this objective,

- A potential outreach strategy might be to partner with community organizations serving new immigrants to offer information on health insurance coverage.
- An application support strategy might be to follow-up with applicants to support them with submitting required verifications.
- A strategy for private plan enrollment could be to retain or expand referral partnerships with bi-lingual brokers.
- A case management strategy might be to educate clients on when and how to report changes in circumstances using tools in their preferred language.
- And a strategy for helping the SOF population renew coverage could be a monthly reminder campaign for clients nearing their renewal date that is in their preferred language.

Grant Objective and Strategies (continued)

- Strategies should be specific to helping overcome barriers that prevent the SOF population from obtaining or maintaining health insurance coverage.
- Strategies should explain the plan for achieving the grant objective. It is not necessary to explain every individual action step, or tactic.
- Grantees will be required to report monthly on tactics used to implement their strategies and their progress towards achieving the grant objective.
- Optional: Applicants can describe any specific resources or expertise that the agency (or paid partners) has that could be of value to the larger navigator community. This response will not be scored but provides information that may be included in a work plan if the applicant is selected.

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Please note that these strategies are specific to helping overcome the barriers the prevent the statement of focus population from obtaining or maintaining health insurance coverage.

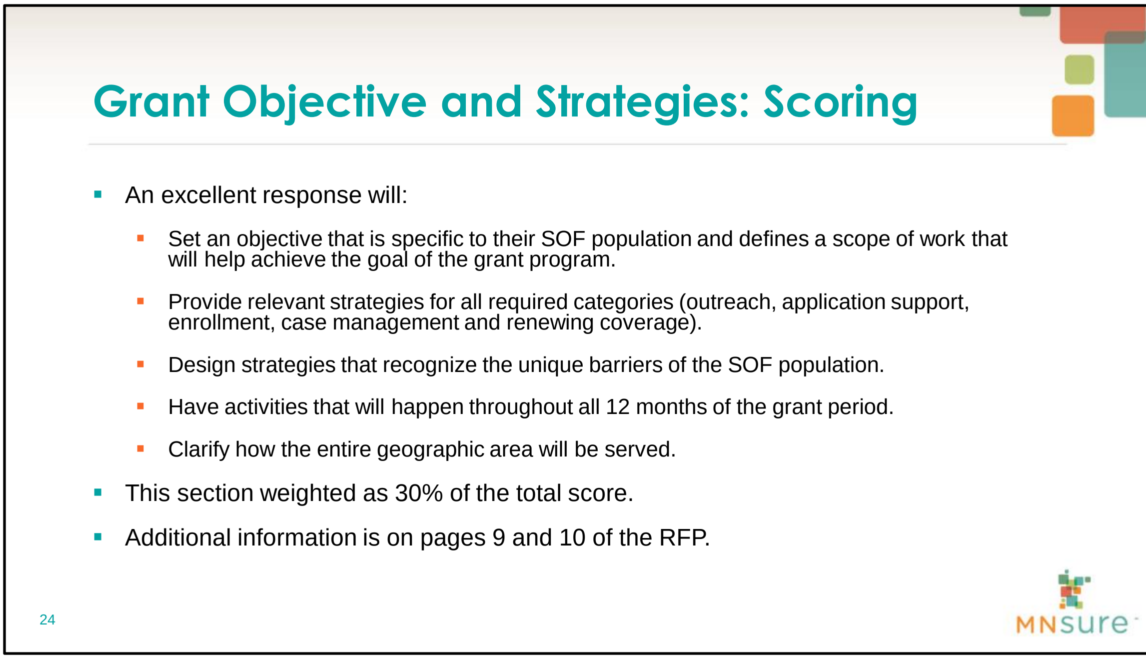
In the example I just gave, immigrants and refugees were the statement of focus population. Since limited English proficiency may be a barrier for this population, the strategies were focused on helping overcome that specific barrier.

The strategies should explain the plan for achieving the grant objective. It isn't necessary to explain every individual action step, or tactic.

Grantees will be required to report monthly on their tactics for implementing their strategies and their progress towards achieving the grant objective.

So, let me give another example. The outreach strategy I used talked about partnering with community organizations. That strategy would be listed in the application. But the specific tactics might be to develop a one-page brochure in the three most common languages to distribute through community organizations. Another tactic for this strategy might be to table at a local food bank once per month. Those specific activities, or tactics, are what a grantee would include on their monthly reports.

There is also one optional question in this section. Applicants can describe any specific resources or expertise that the agency (or paid partners) has that could be of value to the larger navigator community. This response will not be scored but provides information that may be included in a work plan if that applicant is selected.



For this section, an excellent response will:

- Set an objective that is specific to their SOF population and defines a scope of work that will help achieve the goal of the grant program.
- Provide relevant strategies for all required categories (outreach, application support, enrollment, case management and renewing coverage).
- Design strategies that recognize the unique barriers of the SOF population.
- Have activities that will happen throughout all 12 months of the grant period.
- Clarify how the entire geographic area will be served.

This section weighted as 30% of the total score.

Additional information is on pages 9 and 10 of the RFP.

Data Collection

- Grantees must collect and report data to demonstrate progress on carrying out their strategies and achieving their grant objective.
- The data should demonstrate strategies are effective with the SOF population for:
  - Outreach
  - Application support
  - Private plan enrollments
  - Case management
  - Renewal assistance
- Applicants should have policies and procedures to protect private consumer data.

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The next section of the application asks specifically about how the applicant will track grant activities.

Grantees are expected to collect and report data to demonstrate progress on carrying out their strategies and achieving their grant objective.

The data should specifically demonstrate that the strategies are effective with the Statement of Focus population in outreach, application support, private plan enrollments, case management and assisting with renewals.

Applicants, including any paid partners, should have practices in place to protect any private consumer data that is collected.

Data Collection: Scoring

- An excellent response will:
  - Provide clear and reasonable methods for collecting and reporting data necessary to demonstrate achievement of the objective
  - Provide clear and reasonable methods for collecting and reporting data necessary to demonstrate strategies are successful with the SOF population.
  - Describe policies and procedures for collecting and reporting data that protect consumer private information.
- This section weighted as 15% of the total score.
- Additional information is on page 11 of the RFP.

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For this section, an excellent response will provide clear and reasonable methods for collecting and reporting data necessary to demonstrate achievement of the objective and to demonstrate strategies are successful with the SOF population.

The response should also describe policies and procedures for collecting and reporting data that protect consumer private information.

This section weighted as 15% of the total score.

Additional information is on page 11 of the RFP.

Budget and Financial Management

- Applicants must provide a proposed grant budget, including amounts for specific expense categories, such as personnel, supplies, travel, etc.
  - Review the allowable and unallowable expenses on pages 9 to 11 of the RFP.
- Preference will be given to grants that have navigators devoted at least half-time (16 or more hours per week) year-round to grant outreach and enrollment activities.
- The application asks how navigator activities are currently funded and whether the grant would sustain or expand activities.
- Applicants must also describe current grant financial management practices. For a paid partnership, this includes overseeing financial management of paid partners.

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Applicants must submit a budget for completing the proposed objective and strategies. MNsure grant funds must be used to cover expenses that are clearly service-related and are required to minimize administrative costs.

Applicants must provide a proposed grant budget, including amounts for specific expense categories, such as personnel, supplies, travel, etc.

Applicants should carefully review what are allowable and unallowable expenses for a grant. The information is detailed on pages 9 to 11 of the RFP.

Preference will be given to grants that have navigators devoted at least half-time (16 or more hours per week) year-round to grant outreach and enrollment activities.

The application will ask how navigator activities are currently funded and whether the grant would sustain or expand activities.

Applicants must also describe current grant financial management practices. For a paid partnership, this includes how the lead agency will oversee the financial management of paid partners.

Budget and Financial Management: Scoring

- An excellent response will:
  - Budget will not exceed $550,000 and is reasonable given current activities of the applicant and objective and strategies of the proposal.
  - Provide budget line items that add up to total grant amount requested and provide a description of how funds will be used that aligns with the proposal's strategies.
  - Devote at least one certified navigator half time (16 hours per week) or more to grant activities.
  - Demonstrate sustainability with non-MNsure funding for activities.
  - Have appropriate financial systems and practices and previous experience with grants.

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For this section, an excellent response will:

- Request a grant amount that does not exceed $550,000 and is reasonable given the current activities of the applicant and the objectives and strategies of the proposal.
- Provide individual budget line amounts that add up to the total grant amount requested and provide a description of how each category of grant funds will be used that aligns with the proposal's strategies. Proposals should not include expenses that are listed as unallowable.
- Devote at least one certified navigator half time (16 hours per week) or more to grant activities.
- Demonstrate sustainability by having some non-MNsure funding for navigator activities.
- And have adequate financial systems and practices in place and previous experience managing grant funding.

Budget and Financial Management: Scoring (continued)

- This section weighted as 10% of the total score.
- Additional information is on pages 11 to 14 of the RFP.

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This section weighted as 10% of the total score.

Additional information is on pages 11 to 14 of the RFP.

Letters of Support for Paid Partnerships

- For paid partnerships, a letter of support from each paid partner is required.
- Letters of support must be on the paid partner's letterhead, be signed by an agency executive, and provide a summary of the paid partner's role in achieving the objectives of the proposal.
- Letters of support are not scored, but a proposal with paid partners that does not include letters from all paid partners may be considered incomplete.
- Additional information is on page 11 of the RFP.

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The next section of the application is not scored but is required for a paid partnership.

A letter of support from each paid partner must be submitted with the proposal. A paid partner is an organization that will receive grant funds.

Letters of support should provide a summary of the paid partner's role in achieving the objectives of the proposal, be on the paid partner's letterhead and be signed by an agency executive.

While letters are not scored, a proposal that has paid partners and does not include letters of support from all paid partners may be considered incomplete.

Additional information on Letters of Support is on page 11 of the RFP.

Required Statements

- Applicants must complete and upload the following required statements:
  - Attachment A – Responder Information/Declarations
  - Attachment B – Affidavit of Noncollusion
  - Attachment C – Workforce Certification
  - Attachment D – Certification Regarding Lobbying
  - Attachment E – Exceptions to Terms and Conditions
  - Attachment F – Trade Secret/Confidential Data Notification
- Available on the Assister Funding Opportunities webpage under "Navigator Grant Request for Proposals and Required Documents."
- Required statements are not scored, but a proposal with missing statements may be considered incomplete.

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In the final section of the application, applicants must fill out, sign and upload the following required statements:

- Attachment A – Responder Information/Declarations
- Attachment B - Affidavit of Noncollusion
- Attachment C – Workforce Certification
- Attachment D - Certification Regarding Lobbying
- Attachment E – Exceptions to Terms and Conditions
- Attachment F – Trade Secret/Confidential Data Notification

The attachments are available on the Assister Funding Opportunities webpage under "Navigator Grant Request for Proposals and Required Documents."

These required statements are not scored. However, a proposal that is missing any of the statements may be considered incomplete.

Evaluation and Selection

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Next we are going to walk through how applications will be evaluated and selected.

Evaluation Process

- All responsive applications received by the deadline of on or before 1:00 p.m. Central time on February 22, 2024 will be evaluated by MNsure in four stages.
  - Stage 1: Evaluation Based upon Completeness
  - Stage 2: Evaluation of Minimum Qualifications
  - Stage 3: Merit Review
  - Stage 4: Financial Review and Contract Negotiations

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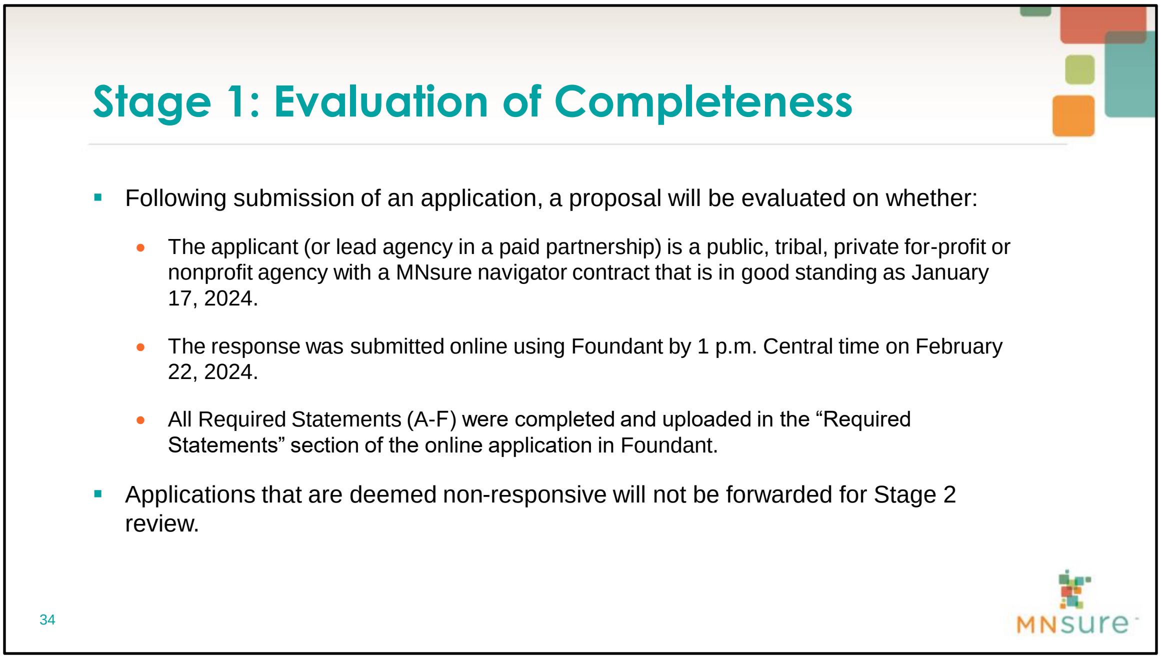
All responsive applications received by the deadline of on or before 1:00 p.m. Central time on February 22, 2024 will be evaluated by MNsure in four stages.

- Stage 1: Evaluation Based upon Completeness
- Stage 2: Evaluation of Minimum Qualifications
- Stage 3: Merit Review
- Stage 4: Financial Review and Contract Negotiations

I will explain each of these stages in more detail.



Following submission of an application, a proposal will be evaluated on whether:

- The applicant (or lead agency in a paid partnership) is a public, tribal, private for-profit or nonprofit agency with a MNsure navigator contract that is in good standing as January 17, 2024.
- The response was submitted online using Foundant by 1 p.m. Central time on February 22, 2024.
- And all Required Statements (A-F) were completed and uploaded in the “Required Statements” section of the online application in Foundant.

Applications that are deemed non-responsive will not be forwarded for Stage 2 review.

Stage 2: Minimum Qualifications

- The grant program will prioritize funding contracted navigator agencies that employ experienced staff with a year-round commitment to providing application and renewal assistance for public and private health insurance options.
- Applicants (or the lead agency in a paid partnership) will be scored on meeting minimum qualifications for agency experience, navigator staffing infrastructure and agency performance.
- Applicants are encouraged to calculate their score before submitting a response. Potential respondents may also request their score by emailing navigatorgrants@mnsure.org no later than 5 p.m. on February 20, 2024.

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The grant program will prioritize funding contracted navigator agencies that employ experienced staff with a year-round commitment to providing application and renewal assistance for public and private health insurance options.

In Stage 2 of the process, applicants (or the lead agency in a paid partnership) will be scored on whether they meet minimum qualifications for agency experience, navigator staffing infrastructure and agency performance.

Applicants are encouraged to calculate their score before submitting a response. Potential respondents may also request their score by emailing navigatorgrants@mnsure.org no later than 5 p.m. on February 20, 2024.

Calculating Minimum Qualifications

- Category 1: Agency Experience (1 point possible)
  - 1 point if the agency has had a navigator contract continually in place since prior to January 1, 2020.
- Category 2: Navigator staffing infrastructure (3 points possible)
  - 1 point for having one actively certified staff member as of January 17, 2024.
  - 1 additional point for having more than one actively certified staff members as of January 17, 2024.
  - 1 additional point if at least one of the actively certified staff members has been continuously certified since January 1, 2020.

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Here is how the minimum qualifications score are calculated.

For Category 1, Agency Experience, there is 1 point possible. The applicant will receive 1 point if the agency has had a navigator contract continually in place since prior to January 1, 2020. If a contract expired or was terminated and later restarted, the experience evaluation will be based on the most recent contract start date.

For Category 2, Navigator staffing infrastructure, 3 points are possible. The applicant will receive:

- 1 point for having one actively certified staff member as of January 17, 2024.
- 1 additional point for having more than one actively certified staff members as of January 17, 2024.
- 1 additional point if at least one of the actively certified staff members has been continuously certified since January 1, 2020.

Calculating Minimum Qualifications (cont.)

- Category 3: Agency performance (8 points possible)
  - 1 point for each quarter of calendar year 2023 that the agency received a per enrollee payment for assisting with any health insurance program.
  - 1 additional point for each quarter of calendar year 2023 that the agency received per enrollee payments for Medical Assistance, MinnesotaCare, and qualified health plan activity in the same quarter.
- The applicant (or lead agency) must receive a minimum of 6 points to advance to Stage 3, with:
  - At least one point in Category 2 (navigator staffing infrastructure), and
  - At least one point in Category 3 from per enrollee payments in the 4th quarter of 2023.

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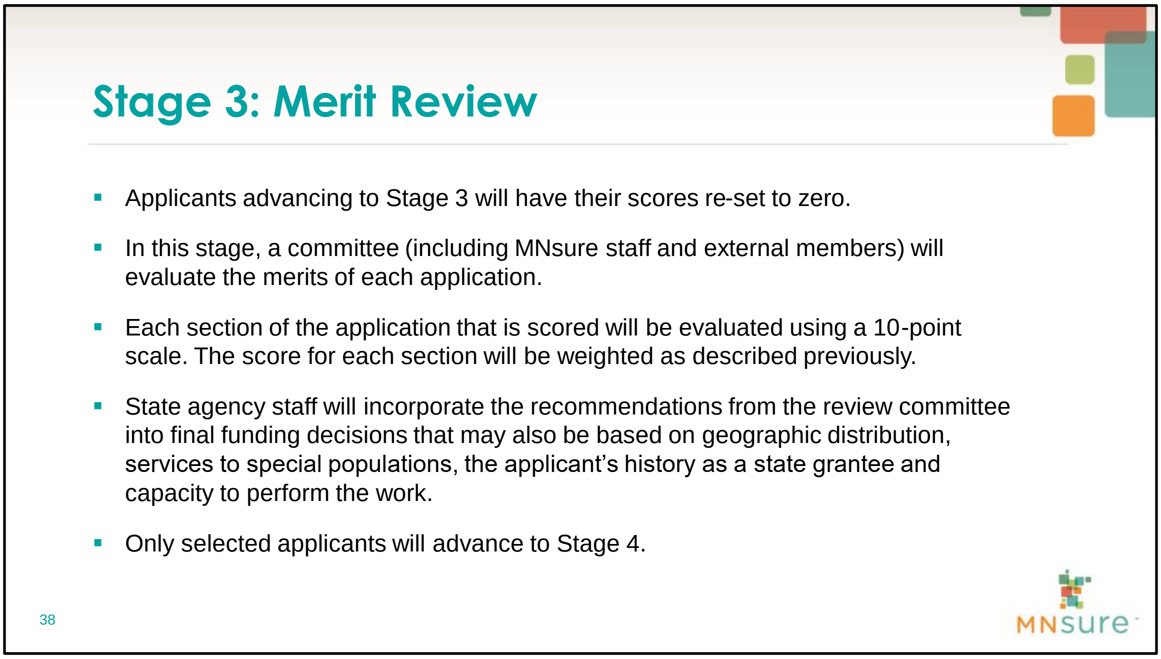
And for Category 3, agency performance, there are 8 points possible.

An applicant will receive 1 point for each quarter of calendar year 2023 that the agency received a per enrollee payment for assisting with any health insurance program.

They will receive 1 additional point for each quarter of calendar year 2023 that the agency received per enrollee payments for Medical Assistance, MinnesotaCare, and qualified health plan activity in the same quarter.

In order to meet minimum qualifications and advance to Stage 3, the applicant (or lead agency) must receive a minimum of 6 points with:

- At least one point in Category 2 (navigator staffing infrastructure), and
- At least one point in Category 3 from per enrollee payments in the 4th quarter of 2023.



Applicants advancing to Stage 3 will have their scores re-set to zero.

In this stage, a committee (including MNsure staff and external members) will evaluate the merits of each application.

Each section of the application that is scored will be evaluated using a 10-point scale. The score for each section will be weighted as described previously.

State agency staff will incorporate the recommendations from the review committee into final funding decisions that may also be based on geographic distribution, services to special populations, the applicant’s history as a state grantee and capacity to perform the work.

Only selected applicants will advance to Stage 4.

Stage 4: Financial Review

- State law requires a pre-award risk assessment for grants of $50,000 or more.
- Applicants advancing to this stage will have 3 business days to submit (if applicable):
  - Exhibit A: Certification of no current principals convicted of a felony financial crime in the last 10 years.
  - Exhibit B: Nonprofit grantee financial documentation (such as Form 990, recent audited financial statements, board-reviewed financial statements, etc).
  - Exhibit C: For-profit certifications (including tax returns, current financial statements, etc)
- Applicants also submit an Accounting System and Financial Capacity Questionnaire
- If not awarded a grant after financial review, applicants may contest the decision.

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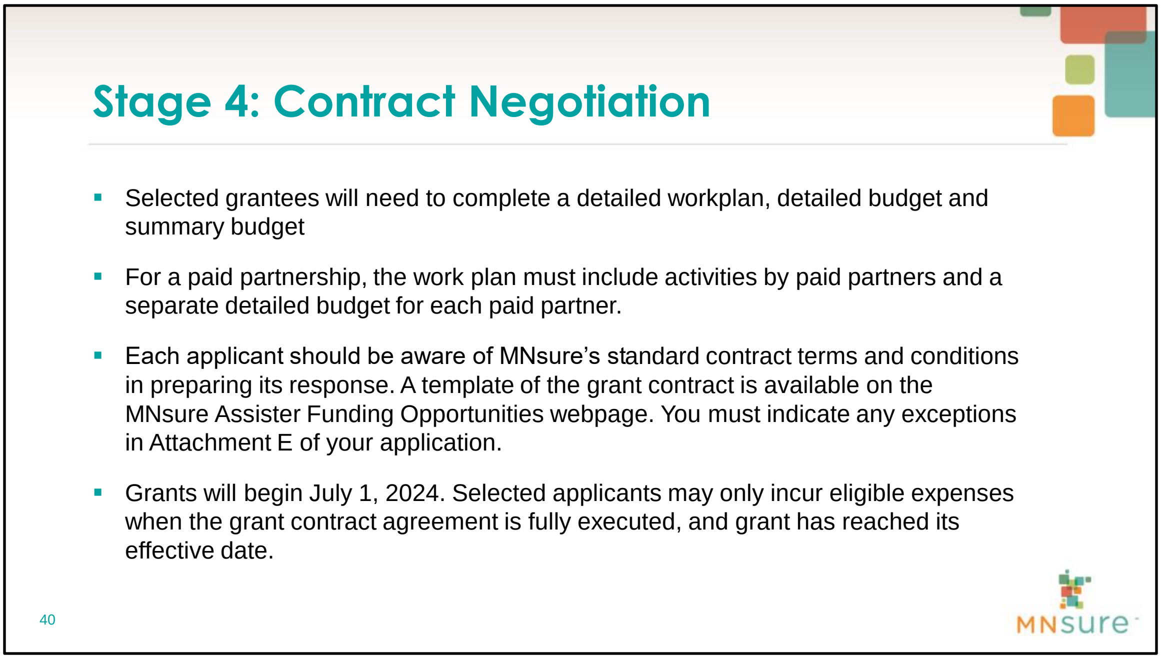
An applicant will be notified if they advance to stage 4.

State law requires a pre-award risk assessment for grants of $50,000 or more. Applicants advancing to this stage will have 3 business days to submit any forms applicable to them, including:

- Exhibit A: A certification of no current principals convicted of a felony financial crime in the last 10 years.
- Exhibit B: Nonprofit grantee financial documentation (such as Form 990, recent audited financial statements, board-reviewed financial statements, etc).
- Exhibit C: For-profit certifications (including tax returns, current financial statements, etc)

Applicants must also submit an Accounting System and Financial Capacity Questionnaire.

If not awarded a grant once reaching this stage, applicants may contest the decision.



Applicants advancing to Stage 4 will also need to complete a detailed workplan, detailed budget and summary budget

For a paid partnership, the work plan must include activities by paid partners and the must be a separate detailed budget for each paid partner.

Each applicant should be aware of MNsure's standard contract terms and conditions in preparing its response. A template of the grant contract is available on the MNsure Assister Funding Opportunities webpage.

If you take exception to any of the terms, conditions or language in the contract, you must indicate those exceptions in Attachment E of your application. Only those exceptions indicated in your response to the RFP will be available for discussion or negotiation.

Grants will begin July 1, 2024. Selected applicants may only incur eligible expenses when the grant contract agreement is fully executed, and grant has reached its effective date.

Grantee Expectations

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If you application is selected, it is important you understand the expectations of a grantee.

Grantee Expectations

- Submit monthly progress reports which include data demonstrating progress on strategies and progress on achieving the grantee's objective.
- Submit monthly invoices and be able to provide documentation of all expenses.
  - All grantee requests for reimbursement must correspond to the approved grant budget.
  - At least two invoices must be reconciled per grant year.
- Participate in at least one site-visit during the grant year.
- Submit a final report within 30 days of the close of the grant fiscal year.
- Grantees may be subject to random monitoring and audits of grant funded activities.

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Grantees must submit monthly progress reports which include data demonstrating progress on strategies and progress on achieving the grantee's objective.

Grantees must also submit monthly invoices and be able to provide documentation of all expenses.

- All grantee requests for reimbursement must correspond to the approved grant budget.
- At least two invoices per grant fiscal year will be reconciled.

MNsure will also conduct at least one site-visit during the grant year.

Grantees must submit a final report within 30 days of the close of the grant fiscal year.

And grantees may be subject to random monitoring and audits of grant funded activities.

Grantee Expectations (continued)

- Grantees must designate a project contact to coordinate with MNsure on grant management and monitoring activities.
- Grantees are expected to coordinate with MNsure and DHS on outreach and enrollment activities, including staffing community events and responding to consumer referrals.
- The grantee will comply with Minn. Stat. §201.162 by providing voter registration services for its employees and for the public served by the grantee.
- As required by Minn. Stat. §16B.98, subd. 12, for any grant in excess of $25,000, MNsure will submit a performance evaluation of the work done under the grant to the Department of Administration. The report will be publicly available online.

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Grantees must also designate a project contact to coordinate with MNsure on grant management and monitoring activities.

Grantees are expected to coordinate with MNsure and DHS on outreach and enrollment activities, including staffing community events and responding to consumer referrals.

The grantee must also comply Minnesota Statutes by providing voter registration services for its employees and for the public served by the grantee.

And, as newly required by Minnesota Law, for any grant in excess of $25,000, MNsure will submit a performance evaluation of the work done under the grant to the Department of Administration. The report will be available online for the public.

If the grant is a paid partnership, please note that:

- The lead agency will need to submit copies of contracts/written agreements with paid partners prior to MNsure payment of the first grant invoice.
- The lead agency is responsible for providing financial oversight of paid partners and collecting data to show progress on the grant objective and strategies.
- Paid partner activities must be included in monthly reporting to MNsure and paid partner expenses should be reflected on monthly invoices.
- And paid partners must also designate a project contact to coordinate with MNsure on grant management and monitoring activities.

This next section of the webinar will explain the steps for submitting your application online through Foundant. I am going to turn it over to my colleague, John Azbill-Salisbury.

Foundant Grant Application System

- The link to login to Foundant is on the Assister Funding Opportunities webpage under “How to Apply.”

How to Apply

Applicants must submit their proposals using the online application site hosted by Foundant Technologies.

1. Go to MNsure’s grant application system, Foundant Technologies.
2. New users will need to create an account. Existing users will need to log in.
3. From the dashboard, click on “Apply” to start an application.
4. Complete each proposal section.
5. If it is a paid partnership, upload required letters of support as a single document.
6. Upload all required statements – Attachments A through F.
7. Click “Preview” button to review to make sure all required information is included.
8. Submit proposal prior to 1 p.m. Central time on February 22, 2024, by selecting the Submit button.

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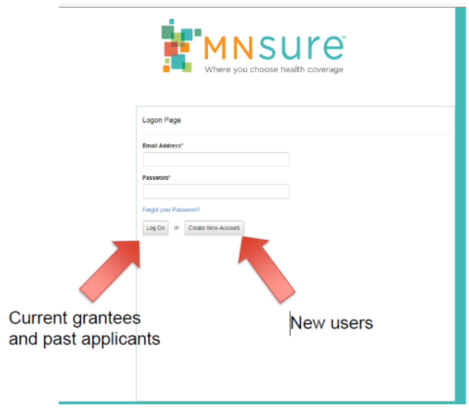
MNsure uses the online application system, Foundant, for our RFP process and for managing grantees.

As this screen shows, the link to log in to Foundant is on the Assister Funding Opportunities webpage under “How to Apply.”

Account Login or Creation

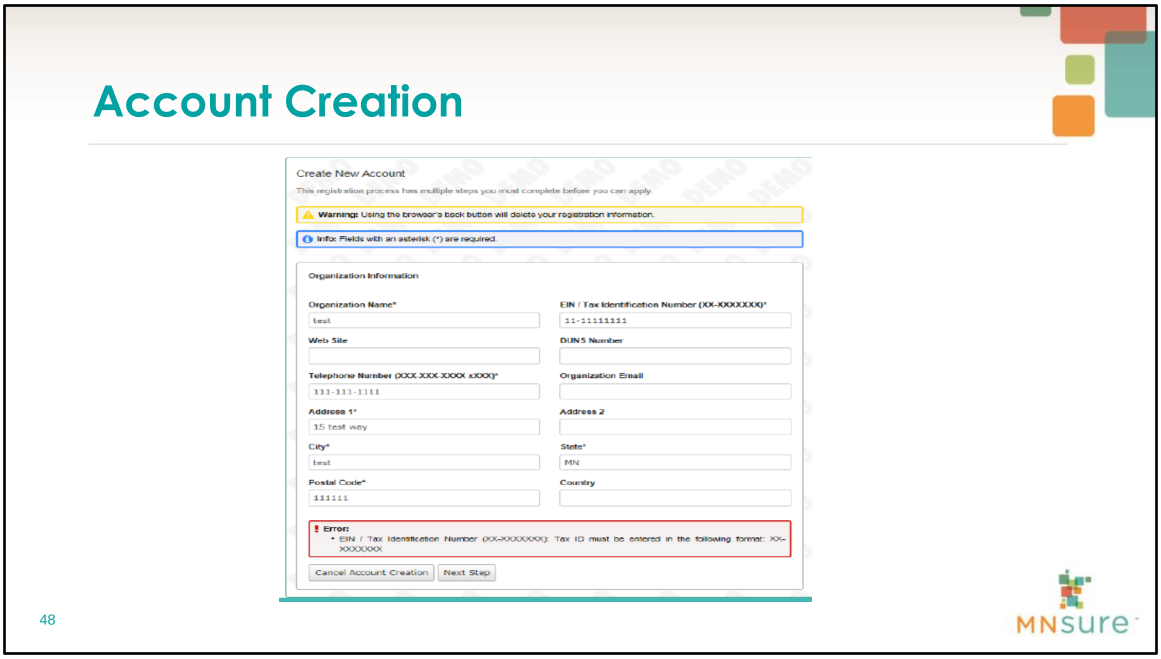


To begin the application, you will need to create an account or, if you already have an account, log in to Foundant.

An application can only be worked on and submitted by a single user.

In this screenshot of the logon page in Foundant, you can see that current grantees and past applicants can click the “Log in” button and use their existing username, which is an email address, and password. If you do not remember your password, click on the “Forgot your password” link.

New applicants should click on the “Create a new account” button to the right of the “log in” button.



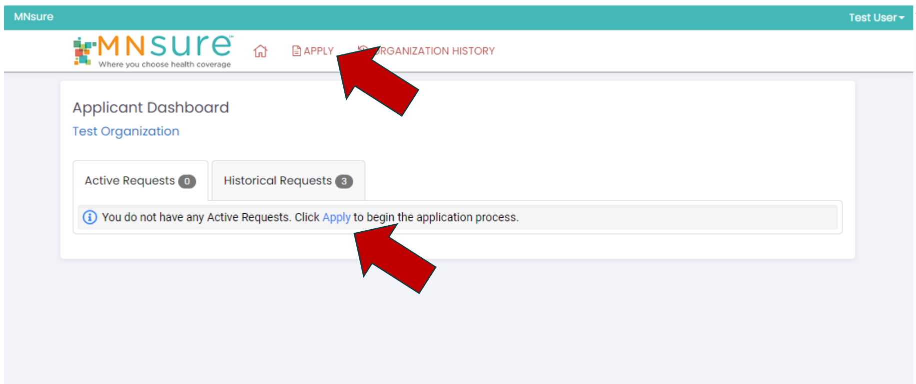
Moving to the next slide which will cover account creation for new applicants.

If you are a new applicant, or this is your first time applying, you will need to complete the multi-step process to create an account so you can apply.

I'm showing a screen of the form you'll need to complete to create an account in Foundant.

- You will be required to enter information about your organization and the person who is filling out the application for the organization.
- Some fields, such as telephone numbers and tax ids have required formats.
- All required fields are marked with an asterisk "*".
- During this registration process, you will create a username and password which will allow you to log into the application site.
- Please make sure to store your username and password in a secure location.
- Once you have finished registration, you will be able to log on to the application site with your username and password.

Applicant Dashboard



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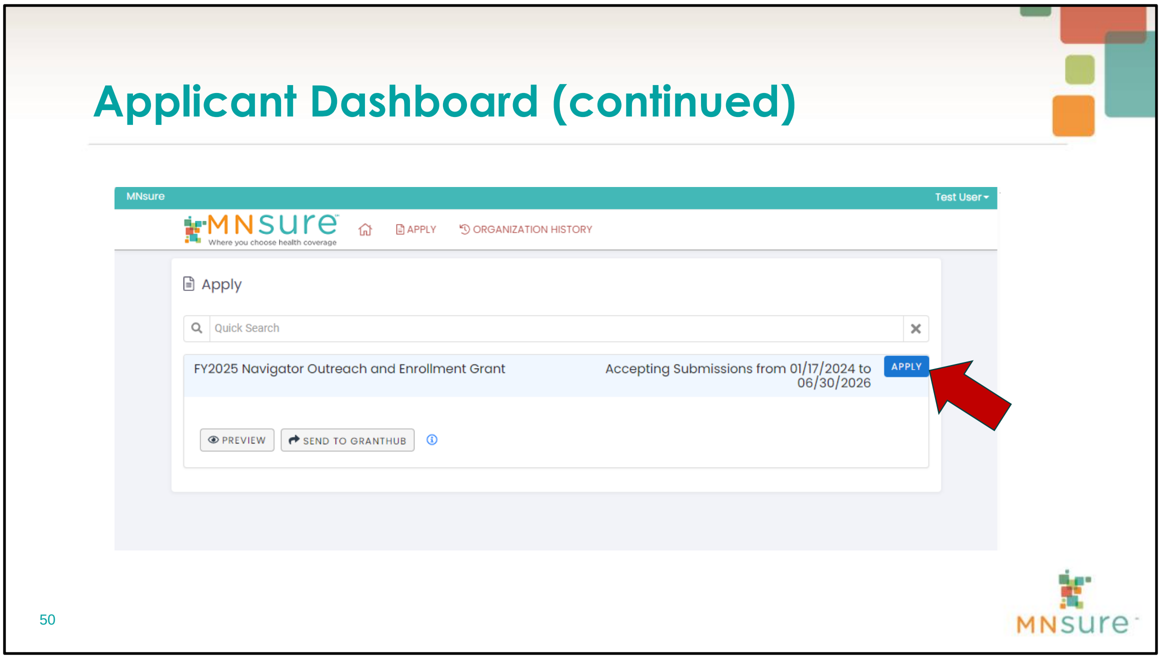
Moving on to the next slide- we will start walking through what you will see in Foundant, once you have registered for an account.

After logging into your account, you will be taken to your dashboard. This slide shows you a screenshot of the applicant dashboard.

This is where you will access the new RFP. On the screen I'm showing the dashboard with two large arrows pointing to the two places you will find "Apply" links to the current RPF: one link is in the top navigation and the other is on the Active Requests tab.



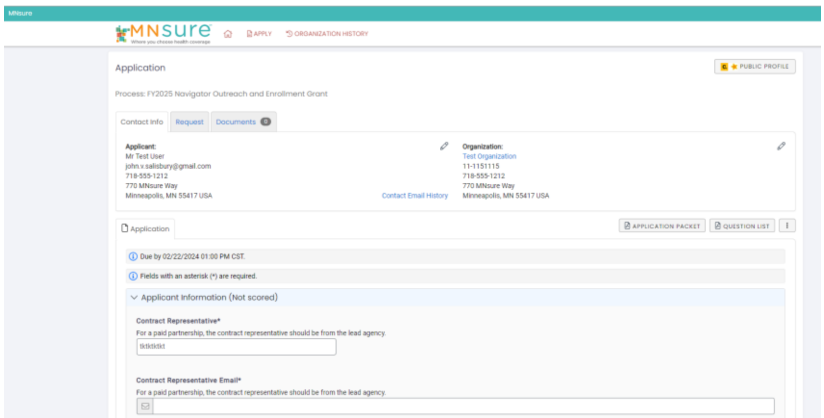
This next slide shows you the screen which you will use to access the application online

This is a screen shot of the what you will see on the applicant dashboard after clicking on one of the “apply” buttons on your landing page.

It shows a tab labeled “FY 2025 Navigator Outreach and Enrollment Grant” with an arrow pointing to an “apply” button on the right. Please note that although it may say MNsure is accepting submissions through June 30, 2026, the deadline to apply is February 22, 2024 at 1 p.m.

Click on that “apply” button to start a new application. All applicants will be using the same application.

Application Landing Page



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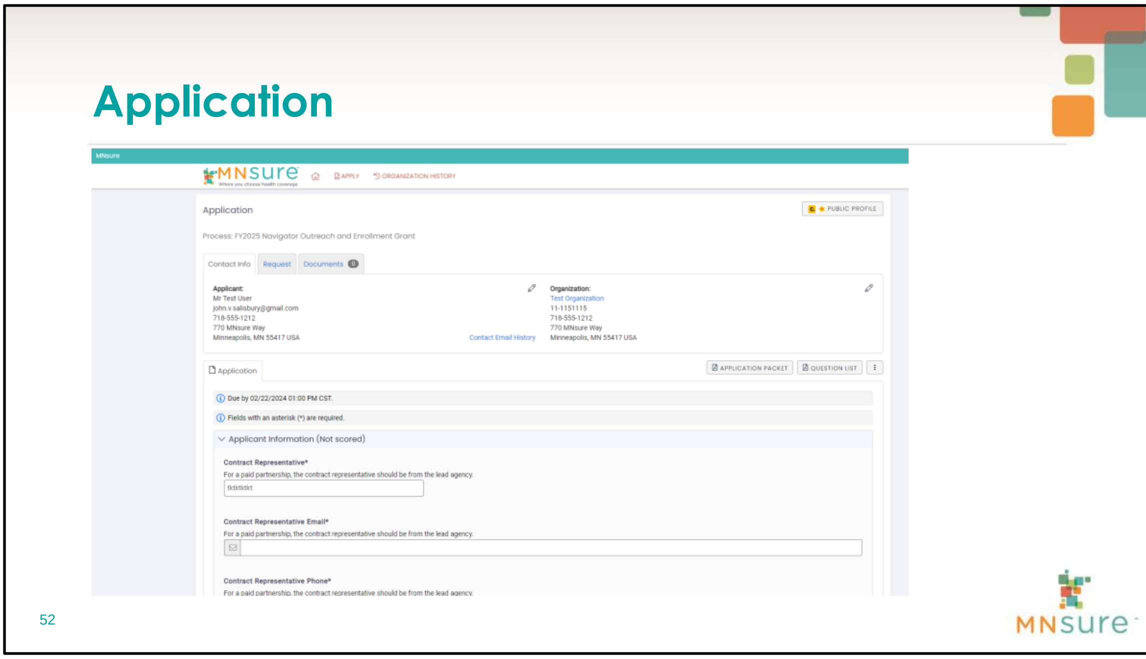
This next slide shows a screen shot of the main landing page for the application, or what an applicant will see after they click to apply button from the application dashboard.

On this screenshot, you can see that the first section of the application, the “Applicant Information” section, starts under the
“Application” tab.

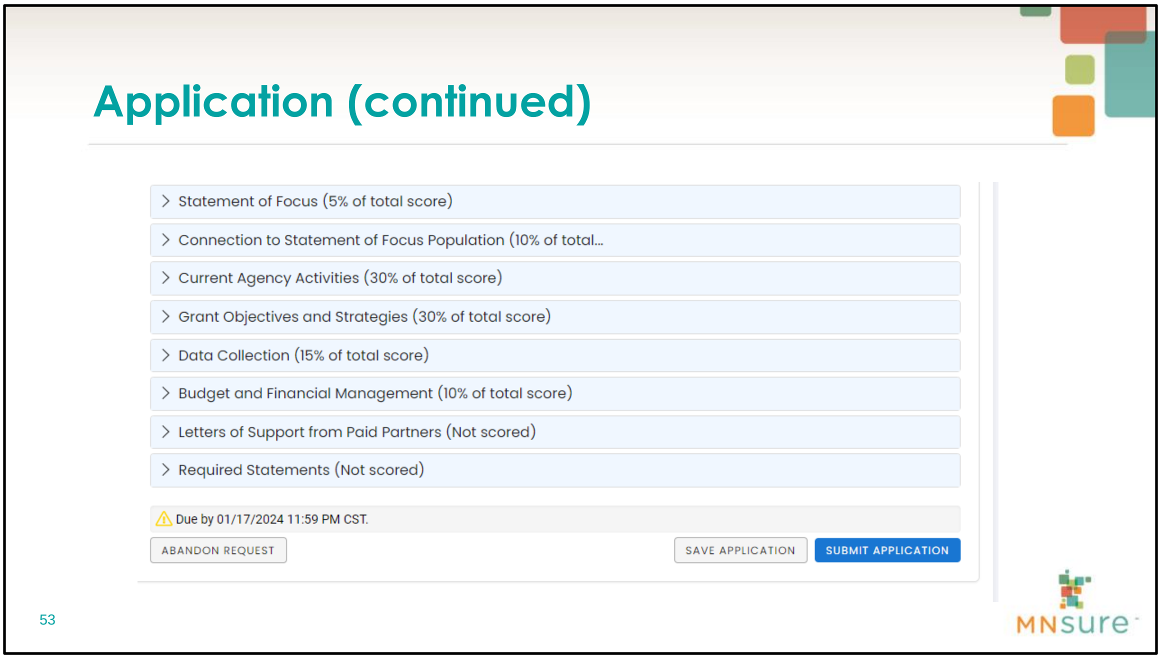
The submission due date of February 22, at 1 p.m. Central time is clearly stated here.



This next slide is a screen shot of a few of the questions you will answer as you complete the application.

The application is a single continuous web-based form with various fields that the applicant will fill out. On this screenshot there are several fields that are marked with an asterisk.

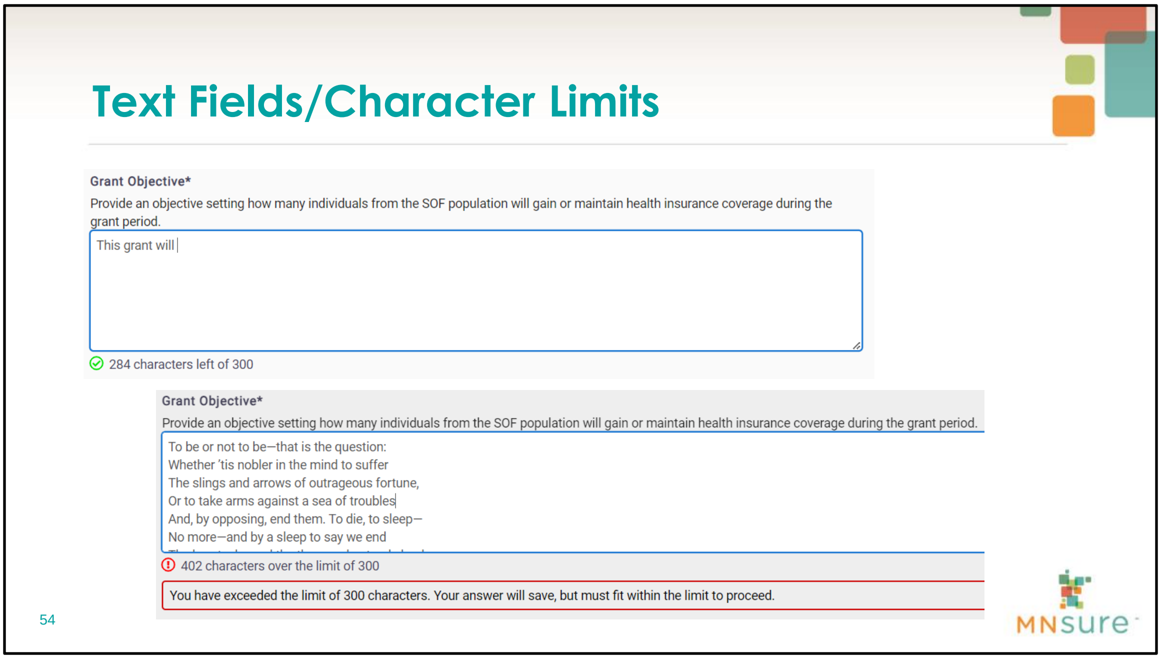
All fields marked with an asterisk will require an answer, even if the answer is “Not applicable” or “0.” If you leave a required question blank, you will not be able to successfully submit your application.



In this slide we will show how the different sections of the application are laid out as part of the online application.

This is a screen shot showing the different sections of the application, which are collapsed into a series of vertical tabs.

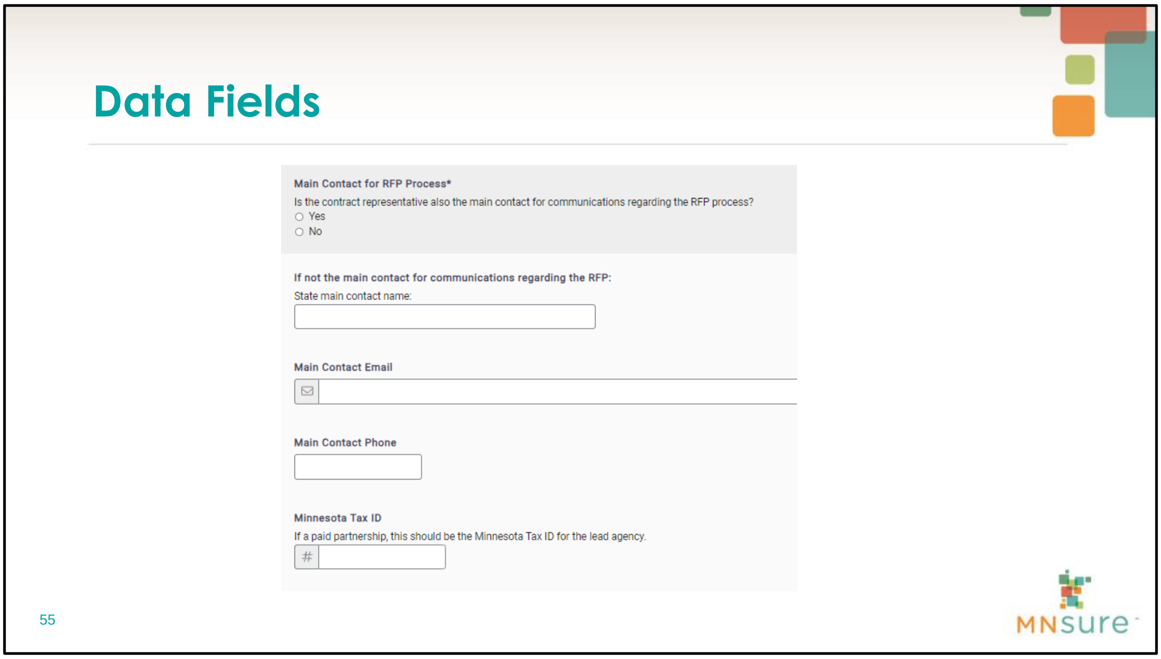
Only one section of the application can be expanded at a time. To complete each section, click on the arrow to the left to the name of the section and that section will expand so you can view and respond to the questions.



In this slide we will discuss the most common type of question of on the application, open-ended questions, followed by text answer field. This slide contains a screen-shot of one of these questions, and below it is a second screen shot of the error message a user will encounter if the exceed the character limit for their answer.

The answer boxes are plain text fields, with no formatting allowed, aside from spacing. All text fields will have a character limit at the bottom of the text entry area. The character limit automatically updates as the applicant enters text in the box. Spaces count as characters, but hard returns do not count against your character limit.

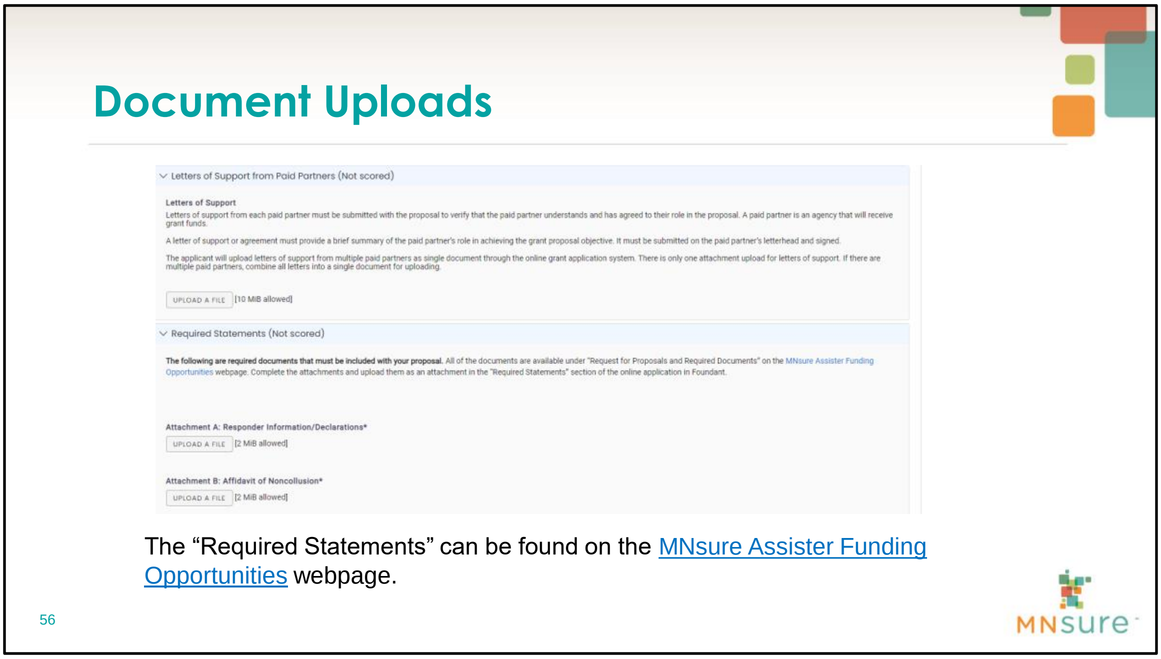
If the number of characters exceeds the character limit, an error message appears. The applicant will be able to save that data, but you cannot submit an application with fields that exceed the character limits. You will have to fix that before your application can be submitted.



In this next slide, we will discuss another one of the common fields you will encounter while filling out an application. This slide has a screen shot of several data fields. One of these fields is marked with a "#." In this field the application asks for specific number in answer to a question. These fields can only be filled with integers. Do not spell out numbers. For example, use "1-0-0" instead of "one hundred".

Another field shows a mail icon. This field must be completed with a valid email address.

Text boxes with no icons no not require a specific format.

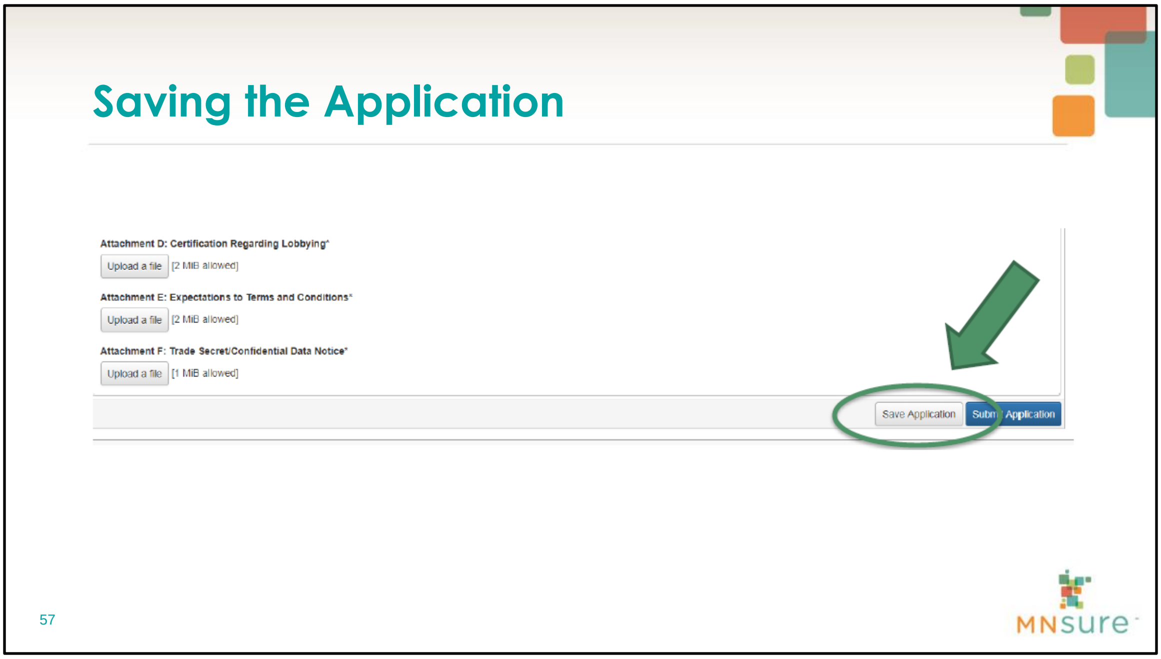


In this next slide, we will discuss how to upload documents as part of your application. The slide shows a screen-shot of a few of the fields which allow you to upload documents directly into your online application.

For example, this screenshot shows where applicants with paid partners are required to upload Letters of Support from those partners, as well as the fields for a few of the required statements that all applicants are required to submit with their application.

When you click the "upload a file" button, a window will appear that will let you upload a document from your computer. Each document upload has a file size limit; you will not be able to upload a file that exceeds that size limit.

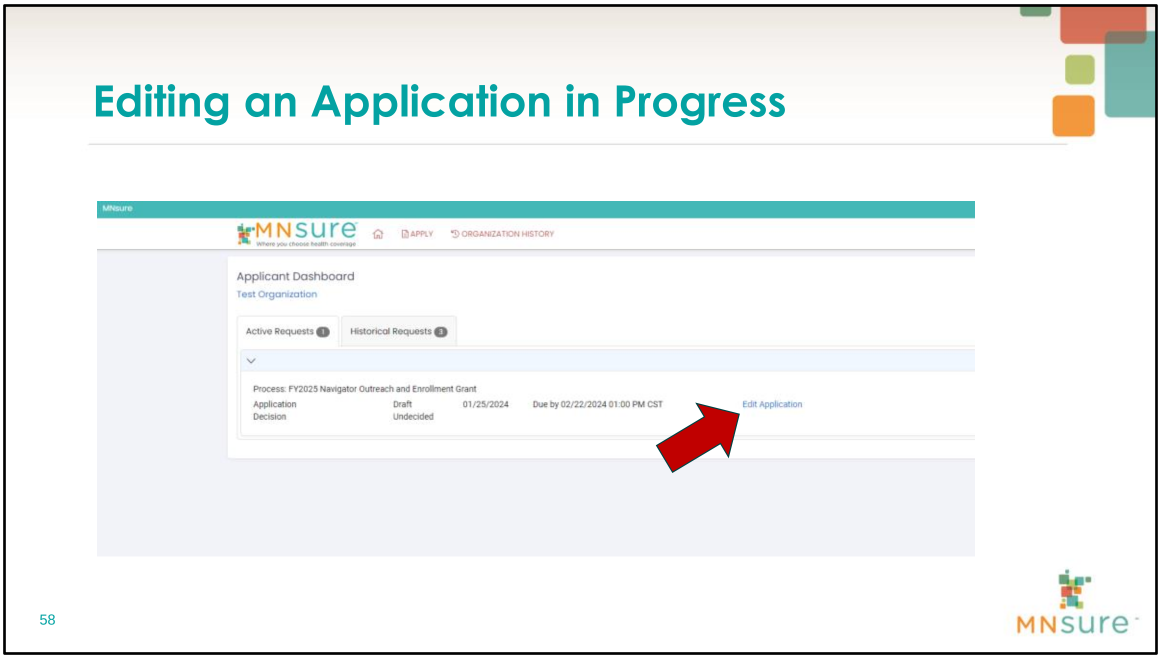
The required statements have document templates that must be completed. These templates can be found on the MNsure Assister Funding Opportunities webpage. Again, that page can be found at the (https://www.mnsure.org/about-us/assister-program/funding-opportunities/index.jsp) or to quickly access this page, go to MNsure.org and search for "navigator grants."



Moving to the next slide, we'll go over how to save an application, while you are working on it.

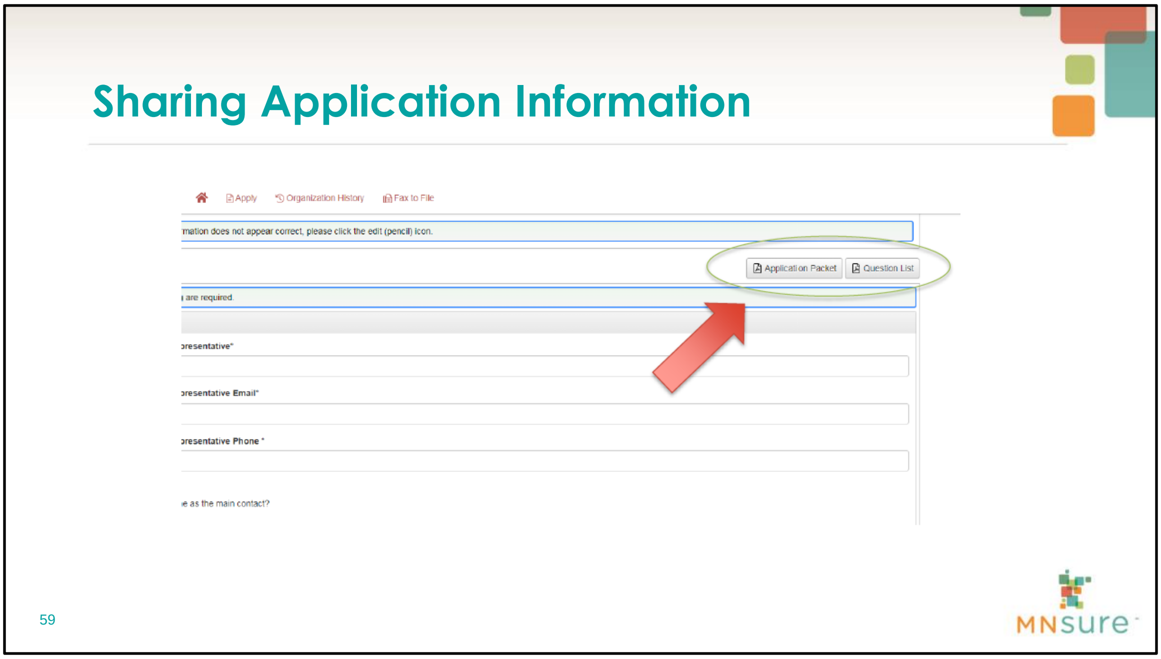
This slide shows a screen shot of the “Save Application” button, which appears at the bottom- right hand corner of the application, to the left of the “Submit Application” button.

Clicking on this “Save Application” button will save any changes you have made to your application in your current work session.



In this next slide, we will show you how to resume work on application in progress. Once you have saved your progress on an application, you can resume the work on your application by clicking on "edit application" link on your dashboard.

This slide shows a screen-shot of an applicant dashboard of an applicant who has an application in progress. Applications in progress will show up on the "active request" tab on the applicant dashboard. The arrow and the circle on the screen highlight the "edit application" link which you will use to return to your work on a current application.



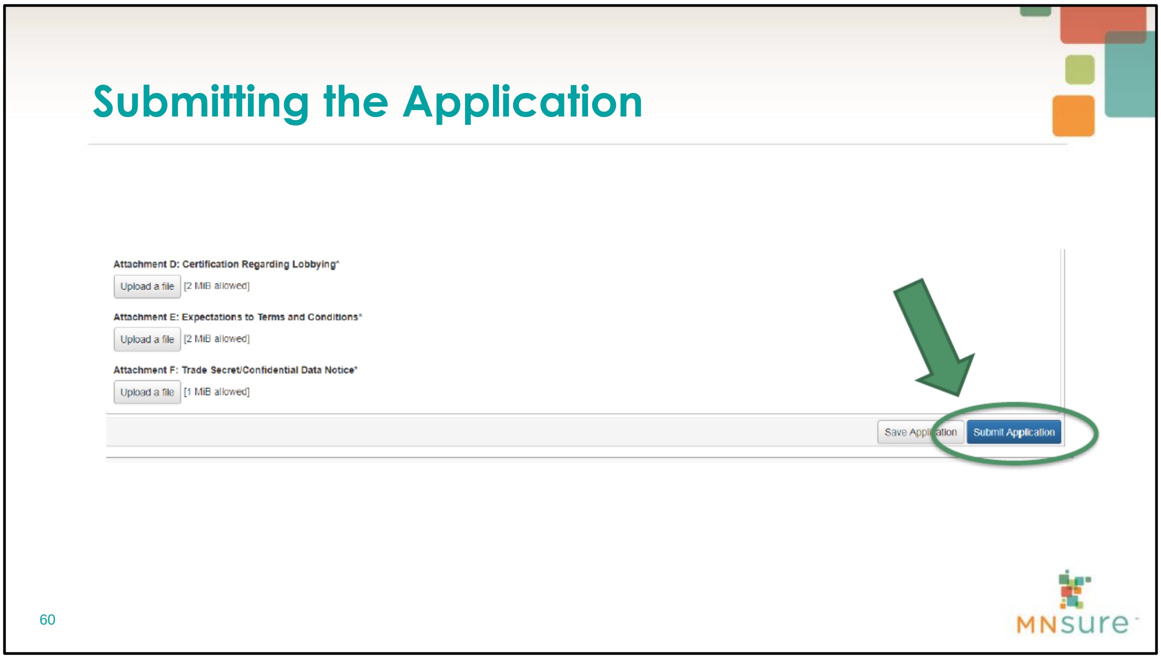
In this next slide, we will talk about ways an applicant can share the information from the application.

The online application system only allows one user to fill out an application, however it has functionality which allows you to easily share the application questions, or your work on the application, with other people.

This slide shows a screen shot of the application page, which highlights the “application packet” and “question list buttons,” both of which allow a user to share application information. These buttons appear on the upper-right side of the application screen.

The “application packet” button creates a PDF of the application questions and the fields that you have filled in.

The “question list” button, which appears to the right of “application packet” button. creates a PDF of just the application questions.



Moving to the next slide, where we'll go over how to submit an application, once you have completed it.
This slide shows a screen shot of the “Submit Application” button, which appears at the bottom- right hand corner of the application, next to the “Save Application” button

- When you are finished with the application, scroll down to the bottom of application page and hit the “submit application” button. Please be aware that the site will not allow you to submit an application, if any of the required fields are empty or incorrectly filled out.
- You will receive a confirmation email at the applicant’s address once the application has been successfully submitted.
- You must hit the submit button for MNsure to process your application. Applications with saved information that are not submitted before the application deadline will not be considered.
- If you accidentally hit the “submit application” button before your application is finished, please send an email to the navigatorgrants@mnsure.org and we will be able to reopen your application for editing.

Tips for Completing the Application

- If you need to work on the application offline, type the information required for each section in a Word document to be copied and pasted into the online system.
- Pay attention to character limits with spaces. Applicants preparing their application in Word can check where they are at with character limits in a word document by highlighting the text and selecting “word count” on the Review panel near the top.
- The online application system tracks the number of characters in a section as the applicant fills that section in and will stop capturing the information you type if you exceed the character limits. The character limits for each field and open text box are posted next to each question in the online application.

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These next two slides offer some tips for successfully completing the application.

If you need to work on the application offline, type the information required for each section in a Word document to be copied and pasted into the online system.

Pay attention to character limits with spaces. Applicants preparing their application in Word can check where they are at with character limits in a Word document by highlighting the text and selecting “word count” on the Review panel near the top.

The online application system tracks the number of characters in a section as the applicant fills that section in and will stop capturing the information you type if you exceed the character limits. The character limits for each field and open text box are posted next to each question in the online application.

Application Tips (continued)

- **Do not wait until the last minute to begin the online submission process.** There will be limited ability to provide technical support on the due date.
- Late responses will not be considered.
- Failure to comply with grant RFP instructions for submitting a proposal may result in the disqualification of any non-complying proposal.

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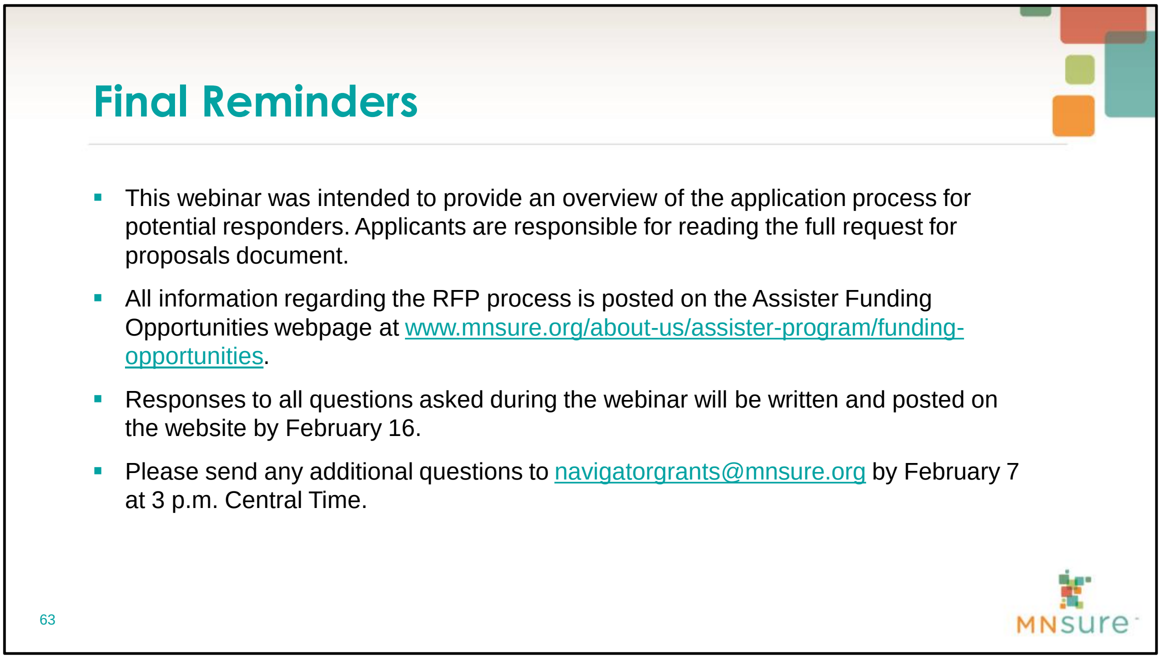
This final slide goes through some important reminders, that applicants should keep in mind as they get closer to application deadline

It is very important to remember not to wait until the last minute to begin the online submission process. There will be limited ability to provide technical support on the application’s due date.

Late responses will not be considered.

And failure to comply with grant RFP instructions for submitting a proposal may result in the disqualification of any non-complying proposal.



A few more reminders before we open it up to your questions.

This webinar was intended to provide an overview of the application process for potential responders. Applicants are responsible for reading the full request for proposals document to make sure you understand all aspects of the RFP.

All information regarding the RFP process is posted on the Assister Funding Opportunities webpage at www.mnsure.org/about-us/assister-program/funding-opportunities.

Responses to all questions asked during the webinar will be written and posted on the website by February 16.

Please send any additional questions to navigatorgrants@mnsure.org by February 7 at 3 p.m. Central Time.