

1998
Annual
Report



Southern Institute
on Children and Families

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Message from the

The mission of the Southern Institute on Children and Families to improve opportunities for children has been sparked by a stellar assignment from The Robert Wood Johnson Foundation. Late in 1997, the Southern Institute was named the National Program Office for Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children. This \$47 million initiative is designed to help states and local communities increase the number of eligible children enrolled in health coverage programs. During 1998, the Southern Institute proudly launched Covering Kids.

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Throughout 1998, the Southern Institute has been buzzing with activity in support of the launch and careful navigation of Covering Kids. Since its inception eight years ago, the Southern Institute has logged thousands of hours working on behalf of children and families in the South.

A major part of that work has focused on child health coverage, particularly the need for outreach and simplification of the eligibility process. We are pleased to be able to apply what we've learned to the Covering Kids initiative and to have the opportunity to help others examine issues and develop strategies that work.

More than 7 million of our nation's uninsured children are believed to be eligible for Medicaid or their State Children's Health Insurance Program (SCHIP) but are not enrolled. Reasons run the gamut, from lack of information and perceived stigma to lack of coordination among benefit programs and the

complexity of application processes. It is a little-known fact that the majority of uninsured children live in families where at least one parent is employed full time at low wages. We must develop more effective strategies for enrolling these children.

Although activities during the past year have focused heavily on child health coverage issues, the mission of the Southern Institute continues to be improvement in the overall well-being of children.

The Southern Institute's work on behalf of low-income families recognizes that, in a land of plenty, many low-income working families are struggling to pay for health care, child care, housing, utilities, food, clothing, transportation and other needs. Caught in between the haves and the have-nots, not being poor enough to qualify for government-subsidized programs and yet not making enough to fully pay for basics such as child care, health coverage and transportation, these families are stranded in a kind of economic no-man's land. Helping low-income working families with the high costs of health coverage, child care and transportation is not welfare. It is a major tool in helping families avoid welfare.

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Sarah C. Shuptrine
President

Message from the

My hometown of Mayersville, Mississippi, is located deep in the Mississippi Delta, miles away from jobs, health care and child care. It is one of many small, isolated, rural communities in the South where families don't have the resources to help their children thrive.

Because I am intimately involved in the plight of the economically disadvantaged rural families I represent in my role as Mayor of Mayersville, I was pleased to host a site visit by the Southern Institute to my hometown in the fall of 1998. The Southern Institute's visit to Mayersville brought hope that some

solutions can be found to persistent problems that have limited the potential of our children. Our families need the help, but they also want to contribute to the development of more progressive policies for families in other rural communities.

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This past year has been an extremely rewarding one as we continue in the role of the National Program Office for Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children sponsored by The Robert Wood Johnson Foundation. This initiative is tackling the quagmire of issues affecting uninsured children who are eligible but not enrolled in coverage programs. It is one step in a progression of steps to improve access to health care for low-income children. Covering Kids has inspired initiatives that unite communities through coalitions with crisscrossing networks of resources.

As 1998 has launched Covering Kids, I know personally that it also has launched greater opportunities for many families who otherwise cannot afford to provide their children with the security of health coverage.

Working together within states and across states, the Covering Kids state and local coalitions will identify effective strategies to implement the program's three objectives of outreach, simplification and coordination, thereby significantly improving access to child health coverage across our nation.

Covering Kids will be a three-year journey that promises to test and to teach.

In many ways, the Covering Kids coalitions will search uncharted

Unita Blackwell
Chairman

The Launching of

In September 1997, The Robert Wood Johnson Foundation designated the Southern Institute to serve as the National Program Office for a new program, Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children. And 1998 witnessed the successful launch of this much needed and exciting initiative.

Covering Kids is a natural extension of the Southern Institute's previous work and a central part of its ongoing mission. The Covering Kids initiative provides three-year grants to help states and communities increase the number of eligible children enrolled in health coverage programs.

The Covering Kids initiative provides three-year grants to help states and communities increase the number of eligible children

Call for Proposals

The Covering Kids Call for Proposal was disseminated in January 1998. From that first spark of the engine, interest has

been strong. A February workshop for applicants attracted 144 participants from 38 states. In addition, 230 individuals attended a national conference, Covering More Kids: Outreach, Simplification and Coordination, held the day after the workshop.

The timing of the Covering Kids initiative is exceptional. Conceived before the passage of the State Children's Health Insurance Program (SCHIP), Covering Kids already was positioned to provide leadership and help public and private organizations form effective partnerships for enrolling low-income

children. The enactment of SCHIP provided even greater opportunities.

Only one application would be accepted per state, so consensus and teamwork were essential. By the May 1, 1998, application deadline, 44 states and the District of Columbia had submitted Covering Kids applications.

Program Expansion

When Covering Kids originally was established, \$13 million was made available to provide grants ranging from \$500,000 to \$1 million in 15 states.

Responding to the enormous interest and need represented by the application volume, The Robert Wood Johnson Foundation more than tripled funding for the program. The expansion meant that every state demonstrating that it satisfied programmatic objectives could have an opportunity to participate. Subsequent to the expansion, the six states that had not initially submitted applications were invited once again to apply, with a new deadline of January 15, 1999. Five out of these six states subsequently chose to file applications, bringing the total number of program candidates to 49 states and the District of Columbia.

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Application Deliberations

Site visit team members, comprised of the Covering Kids National Advisory Committee, Southern Institute staff and Robert Wood Johnson Foundation staff, conducted 34 site visits between July and December of 1998. It is apparent by the participation in these site visit meetings that child health coverage ranks high on the agendas of public and private groups working on behalf of children. Officials of state Medicaid, CHIP and TANF agencies attended the

meetings, and, in a few instances, state governors or lieutenant governors cleared their busy schedules to participate in some capacity. Representation from advocacy groups and provider organizations was strong. In many states, religious organizations, schools and businesses also participated.

The site visits packed much into a single day. State lead organizations shared background demographic, geographical and child health coverage information and presented details on how the statewide goals would be accomplished. Each of the pilot lead organizations, in turn, presented information on how they would implement goals outlined in the application. The Covering Kids site team probed on the three goals of outreach, simplification and coordination, and ensuing discussions addressed questions and concerns. Each applicant had to demonstrate that it possessed the collaborative

resources and know-how to satisfactorily achieve the objectives of Covering Kids.

Subsequent to the presentations, the site visit team reviewers met in private to discuss the strengths and weaknesses of the

information presented. This was followed by an "exit" meeting, where the state applicant typically was required to submit additional information. The group also discussed technical assistance needs so that the Covering Kids National Program Office could begin garnering necessary resources to help grantees meet program objectives.

The Covering Kids National Advisory Committee convened twice, in June and October, to further review applications and site visit reports and to make recommendations on grant awards. Representatives of the National Advisory Committee, the National

By the end of the year, the first 21 Covering Kids grantees had been selected.

Program Office and The Robert Wood Johnson Foundation adhered to high standards as they deliberated the composition of state and local coalitions, the innovation of pilot communities, the commitment of state government, the viability of coverage strategies and the potential for enrolling eligible children – and continuing to do so beyond the grant period.

First Grantee Selections

By December, the first 21 Covering Kids grantees had been selected, with public announcements embargoed until early 1999.

The first Covering Kids awards were to: Alaska, Arizona, Arkansas, Colorado, Connecticut, Georgia, Illinois, Kentucky, Maine, Massachusetts, Montana, New Mexico, New York, North Carolina, Oklahoma, Oregon, Pennsylvania, Tennessee, Texas, Washington and West Virginia. These 21 statewide projects also include pilot initiatives in nearly 100 communities.

In November, Covering Kids proudly unveiled its new website, located at www.coveringkids.org.

Website Establishment

In November, Covering Kids proudly unveiled its

Southern Regional Initiative

In 1997, The Robert Wood Johnson Foundation awarded a grant to the Southern Institute for the exploration of policies and procedural requirements that affect access to benefits for low-income families with children, including health coverage and child care. In cooperation with states and welfare officials, information-gathering site visits were conducted in 17 southern states and the District of Columbia. The Foundation for Child Development provided additional support for two of the site visits.

In February 1998, the Southern Institute published a report based on its 1997 site visits.

Titled, Southern Regional Initiative to Improve Access to Benefits for Low Income Families with Children, the report provided information and guidance on eligibility policies, procedures and communications that can better support working parents. It

supplied the foundation for subsequent activities of this initiative. It is available in hard copy and over the Southern Institute website at www.kidsouth.org.

Throughout 1998, the Southern Institute continued to work with southern states to improve access to benefits for low-income children and families. The major activities during the year are described below.

Child Health Coverage Eligibility Verification Issues

Throughout 1998, the Southern Institute continued to work with southern states to improve access to benefits for low-income children and families.

When families apply for Medicaid coverage for their children, they are warned of fraud penalties and must attest to their knowledge of the consequences of making untruthful statements when they sign the Medicaid application. Families generally are required to provide documentation to prove

certain statements made on their application. In bureaucratic terms, such documentation is called "verification."

Medicaid application procedures and verification requirements evolved from welfare rules and are long overdue for an examination of their relevance to a health insurance program for children. Rules vary by state because states have considerable flexibility in deciding the extent to which verification is required.

Medicaid application procedures and verification requirements evolved from welfare rules and are long overdue for an examination of their relevance to

Prompted by the widespread confusion about complex eligibility verification issues for child health coverage programs, the Southern Institute conducted a regional meeting attended by Medicaid and SCHIP officials from 15 southern states, as well as representatives from the Health Care Financing Administration. This essential dialogue took place September 15-16, 1998, in Charleston, South Carolina.

A primary objective of the regional meeting was to answer questions raised by eligibility workers in response to a poll distributed prior to the meeting. Also on the agenda was the discussion of state suggestions for reducing verification. At the conclusion of the meeting, the HCFA representatives took with them additional questions for follow-up response. The wisdom garnered from this meeting and subsequent communications with HCFA resulted in the December publication of a reference book titled The

Burden of Proof: How Much Is Too Much For Child Health Coverage?

Burden of Proof, which has become one of the Southern Institute's most requested publications, provides straight answers to questions addressing verification requirements at application and at redetermination, as well as information on a variety of additional related topics. Hard copies of the publication can be ordered from the Southern Institute. It also is available online at the Southern Institute's website at www.kidsouth.org.

Child Health Coverage Communication Strategies

In August 1998, the Southern Institute convened a meeting of key players on the national

scene who work to improve access to children's health coverage. The purpose was to brainstorm strategies for more effectively communicating with families about health coverage opportunities.

Representatives from four southern states (Arkansas, Florida, Georgia and Tennessee) also participated, providing some valuable firsthand perspectives from the field.

Participants in the communication strategies meeting shared their views and outreach/marketing experiences. Information from the discussion, as well as participant responses to a communications questionnaire on national organization strategies in the areas of outreach, simplification and coordination, are available on the Covering Kids website.

At the request of participants, the meeting evolved into a more structured series of strategy

In August 1998, the Southern Institute convened a meeting of key players on the national scene who work to improve access to children's health coverage.

sessions involving national organizations working on child health coverage initiatives. The meetings henceforth will be convened under the auspices of Covering Kids and will focus on specific topics related to the role of communication and information outreach.

Continued Replication of Information Outreach Brochures

Groundbreaking studies by the Southern Institute have documented the need for more effective

communications with families. Reaching the families of uninsured children will necessitate the development of consistent, relevant messages and effective dissemination strategies. The Southern Institute website provides information on previous studies and strategies for improved communication and information outreach.

The Southern Institute's three information outreach brochures effectively communicate the availability of benefits to low-income families. The outreach brochures were enthusiastically received during 1997 and 1998. One brochure is targeted to families on cash assistance, another is designed for general community outreach and the third provides employers with information on how to inform low-wage employees about available benefits for their children.

As part of the Southern Regional Initiative, the Southern Institute provided technical assistance to replicate the information outreach brochures. Once adapted to reflect each state's eligibility criteria, states were responsible for printing and distribution

In 1998, the Southern Institute began preparing Spanish versions of its two consumer brochures.

costs. As of December 1998, 16 southern states are using the Leaving Welfare for Work Isn't As Scary As It Seems brochure, 14 are using the Have You Heard About Benefits for Working Families??? brochure, and 13 are using the Facts for Employers brochure.

In 1998, the Southern Institute began preparing Spanish versions of its two consumer brochures. Because they will not contain any state-specific eligibility information, the completed Spanish brochures will be suitable for use in any state. The Spanish brochures will be made available on disk to southern states, which will be responsible for printing and dissemination.

The Southern Institute also produced videotapes to be used in conjunction with the brochures, including a staff training video. The consumer videos are available in both English and Spanish. The Southern Institute is conducting an analysis of findings from a survey that examines how states are using the brochures and videos. A report will be completed in mid-1999 and will be available on the Southern Institute website.

Southern Institute Website

The Southern Institute's website is located at www.kidsouth.org. The website includes information about the states where the Southern Institute's work is concentrated, its current projects and southern regional data on uninsured children.

The website features separate sections focusing on the topics of Health, Child Care, Transportation, Education and Income Support, in addition to the Covering Kids linking button. The website includes a selection of speeches and publications that can be viewed or ordered online. In addition, the information outreach brochures mentioned above can be ordered or downloaded from the website in Portable Document Format (PDF).

An "Announcements" page provides the latest

Mayersville, Mississippi: A Dialogue on Rural Issues

In an effort to better understand the special issues and challenges that face rural families, the Southern Institute in November 1998 embarked on a site visit to Mayersville, Mississippi. A community of approximately 500 people located in the heart of the Mississippi Delta, Mayersville is the hometown of Mayor Unita Blackwell, Chairman of the Board of Directors of the Southern Institute.

Four meetings were held during the visit. The first was with parents and grandparents. Participants in the second meeting included community leaders, health providers and parents. The third meeting was with local and state Department of Human Services (DHS) and the Medicaid Division staff. And the fourth meeting was a Town Hall assembly held in the evening, which drew about 50 people.

Participants at all the meetings were asked to share their views on issues related to access to child health care, child health coverage, child care and transportation. It was evident that the residents attending the meetings were interested in their community and eager to participate in discussions about the future of their children. When asked to describe their greatest challenges raising children in Mayersville, parents and grandparents identified fundamental issues, any of which would be a significant barrier to the ability of families to meet the needs of their children:

- △ Lack of jobs
- △ No local health care provider
- △ No child care services

A major challenge has been the fragmentation of the multiple public programs designed to help low-income residents of economically deprived

- Δ Lack of transportation
- Δ No recreational facilities for children

The Southern Institute initiated follow-up work on issues identified during the site visit. Clearly there are opportunities, but a major challenge has been the fragmentation of the multiple public programs designed to help low-income residents of economically deprived rural communities.

The 1998 visit to Mayersville was conducted as part of the Southern Regional Initiative grant from The Robert Wood Johnson Foundation. A second visit is

As the Southern Institute enters its ninth year of service, it is poised to provide leadership to public and private organizations working to assure that child health coverage policy initiatives translate into a significant reduction in uninsured children. The Southern Institute also will continue its work on the access issues identified during its meetings held across the South in 1997-98.

Covering Kids

During 1999, the responsibilities associated with being the National Program Office for Covering Kids will be the top priority for the Southern Institute. Covering Kids will begin monitoring grantee implementation activities while continuing to:

- Δ review Covering Kids applications and conduct site visits;
- Δ research and prepare technical assistance reports;
- Δ provide training and professional development programs for grantees;
- Δ serve as a resource for organizations working to conduct effective outreach and to simplify and coordinate eligibility processes for child health coverage; and
- Δ raise awareness of the mission of Covering Kids.

During 1999, the responsibilities associated with being the National Program Office for Covering Kids will be the top priority for

As programmatic and budgetary reviews continue, the Covering Kids National Program Office

will work toward the goal of achieving all grant decisions by mid-1999.

Mayersville, Mississippi

The Southern Institute also will be following up on issues identified during its initial visit and will conduct a second visit in 1999 to rural Mayersville, Mississippi. A report will be prepared to provide information on follow-up activities and lessons learned.

Child Care Initiative

During 1999, the Southern Institute will seek to expand its work on child care assistance issues. Affordability of quality child care is a major public policy issue that affects both low-income and middle-income families. Research has shown that paying the high cost of child care is especially burdensome for low-income families.

The push to move families from welfare to work has added urgency to the need for community, state and federal action on behalf of families who

The push to move families from welfare to work has added urgency to the need for community, state and federal action on behalf of families who cannot afford to pay for child care on their earnings alone.

Unlike Medicaid, child care is not a federal entitlement program, and thus there is no guarantee of access to child care assistance, even if families are eligible under a state's criteria. Therefore, the number of eligible families who actually receive assistance is determined by the amount of funding made available by each state. The sufficiency of funding for child care assistance programs varies considerably across the southern states. Additionally, the child care assistance eligibility process needs review to assure that it is not impeding access for eligible families.

The Southern Institute is in a position to

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