



Outreach Planning 2.0

Reaching and Engaging Consumers

Open enrollment has started, and new health coverage options are available. As you provide outreach and education to your target audience, your infrastructure and outreach plans may evolve. This guide has three sections to assist you in the process of starting, adapting, and improving your efforts:

- 1 Setting Up Your Infrastructure and Processes
- 2 Preparing to Direct Consumers to the Right “Door”
- 3 Measuring Your Success

When designing or redesigning your outreach and/or in-reach plan check off these items to ensure your infrastructure and processes support your goals.

1 Setting Up Your Infrastructure and Processes

Understand your organization’s mission, the population your organization serves, the organization’s resources (for example, funding and equipment), and your staff capacity for outreach.

- Identify your organization’s main goals—this will inform the particular outreach strategy you choose to pursue.
- Assess the internal and external resources that are available to you.

Understand the community you serve, and determine staffing needs so you can customize your services.

- Hire staff who represent the community you serve, including employees who speak the same language(s) as community members. If you are not able to hire bilingual staff, ensure that a language line service is available.
- Recruit people from the community to work or volunteer with your organization. This will help build trust within the community and increase your reach.
- Consider other ways to fulfill shorter term staffing needs. Place an AmeriCorps VISTA (Volunteers in Service to America). This can be a viable and cost effective option.

Establish or improve your organization's operations and processes.

- Promote your hours of operation, and try to offer hours that are convenient for consumers. This may include early mornings, nights, and weekends.
- Ensure that staff and volunteers who are from different departments but who all assist consumers work together and complement each other's initiatives. For example, if one group of staffers provides application assistance, and another group conducts outreach, make sure they communicate with each other to coordinate efforts.
- Implement systems to monitor outreach activities, and evaluate their impact on other departments, particularly regarding staff capacity.
- Coordinate the information that is provided to your target population across different departments to ensure consistency.
- Establish and monitor protocols for returning calls from messages left on voice mail. Important to establish processes for when staff and volunteers will return messages so calls are returned in a timely manner.
- Conduct "in-reach," and provide relevant information to equip staff across your entire organization with the facts they need to know to ensure that consumers get help. Ensure staff know these four facts:
 - All insurance plans will cover doctor visits, hospitalizations, emergency room care, prescription drugs, and maternity care.
 - You might be able to get financial help (tax credits) to pay for a health insurance plan.
 - If you have a pre-existing condition, health plans cannot deny you coverage.
 - All health plans will have to show the costs of the services they cover, and they must do so in simple language with no fine print.

Maximize existing technology.

- Tailor on-hold messages on your organization's phone system to promote health coverage options and the services you provide. Record these messages in the appropriate languages for your community.
- Implement automated voice recordings into your organization's phone system that include a feature for people to select an option that directs them in their primary language, if your target population includes people who speak a language other than English (for example, "select 1 for English, 2 for Spanish, 3 for Portuguese," etc.).

Important: If callers reach voicemail, explain what information they need to leave in order to get a call back (remind them not to leave personal information like Social Security numbers).

 Use this checklist to help you develop or refine your outreach plan.

2 Preparing to Direct Consumers to the Right "Door"

Create an outreach work plan.

- Outline goals, strategies, activities, timelines, expected outcomes, and outcome measures. Ensure that each activity is spelled out in detail and has a designated staffer who is responsible for execution.
- Identify the staff and volunteers who will develop the outreach plan. Ensure that those who will be doing the work are included in the process of developing the work plan.
- Explore effective and creative outreach strategies to include in your work plan. If you've seen another organization implement a strategy successfully, steal shamelessly.

- ❑ Tailor your outreach work plan to suit your target audience. Design outreach activities that effectively reach consumers directly and/or “trusted messengers” who may be better able to deliver your message to consumers.

Identify your target population, and know where to find uninsured people in your community.

- ❑ Use existing resources to identify the demographics of uninsured people in your community—including breakdowns by race or ethnicity, income level, and age. Visit Enroll America’s website (www.enrollamerica.org/maps) to check our outreach maps and find out where uninsured people live in your state.
- ❑ Talk to people who are in your target group, as well as others in your target region, to learn where and how uninsured people in your community spend their time.

Capitalize on your organization’s existing resources, and build on the strengths of others in your community.

- ❑ Evaluate whether the people your organization reaches and serves are part of your target population, or whether they could be “trusted messengers” to reach your target population.
- ❑ Research other groups that may be spreading the word and/or providing application assistance in your region. It’s important not to duplicate efforts.
- ❑ Identify existing and potential new partners who serve your target population and establish a referral network. Depending on each other’s role, you can refer consumers to those organizations that provide application assistance, or they can refer consumers to you for enrollment assistance.

- ❑ Provide office space where partner organizations can meet with patients or consumers.

Develop new materials (or find suitable materials elsewhere) to reach your target population.

- ❑ Conduct consumer testing before developing your materials, or tap into your network to find consumer-tested materials that have already been developed.
- ❑ Use plain language to develop user-friendly materials that have a clear and consistent design, as well as culturally and linguistically appropriate images and messages. You can use Enroll America’s health literacy series as a resource (<http://www.enrollamerica.org/best-practices-institute/enroll-america-publications>).

 When measuring your success, make sure to use this check list!

3 Measuring Your Success

TRACKING AND MONITORING YOUR EFFORTS

Establish processes for when and how you will collect and track data that will help inform your progress.

- How often do you plan to collect and track data to inform your outreach efforts?
 - ❑ Daily
 - ❑ Weekly
- How are you going to collect and track data?
 - ❑ Use technology (for example, use a database system that helps you collect and track data—Identify a technology that meets your data collection needs).
 - ❑ Ask staff to collect or track data manually.

Identify what you need to—and can—monitor, and implement a system to track your activities and outcomes. Examples of activities and outcomes you can track:

- Number of calls received
- Number of events held
- Number of attendees at events
- Number of individuals who signed for health coverage

Implement systems to monitor the ways consumers have learned about your organization.

- Ask consumers how they heard about you and the services you provide, and check off the items on your list. The options you will give consumers and patients depend on your strategies. Examples of categories you can use include:
 - flier (ask where they received the flier, if possible)
 - radio interview (ask to specify which one)
 - community event (ask to specify where)
 - presentation at community-based organization (ask to specify location and which organization)

EVALUATING AND MEASURING YOUR RESULTS, AND REFINING YOUR PROCEDURES AS NEEDED

Establish systems to assist you in evaluating your results (stop, think, and reflect on your efforts).

Determine when and how you will evaluate your activities and strategies.

- How often do you plan to evaluate your efforts?
 - Daily
 - Weekly
 - Monthly
- How are you going to evaluate your activities and strategies?

- Use a database system that will allow you to monitor and run reports to assist with quantitative evaluation—create regular reports to provide feedback to staff doing the outreach.
- Conduct the monitoring and evaluation process manually.
 - Are you doing qualitative evaluation? Ask yourself, your staff, and volunteers (individually or through surveying) these questions:
 - Which strategies are working? Are they more effective with specific racial or ethnic groups?
 - Which strategies and/or activities do you need to improve or change?
 - How will you change those strategies or activities?

Note: If you need to modify a strategy and/or process, you can follow the PDCA Cycle¹ to assist you:

Plan: Identify and analyze the problem.

Do: Develop and test a potential solution or new outreach strategy.

Check: Measure how effective the test solution or strategy was.

Act: If it was successful, implement the solution or strategy fully. If the strategy was not successful, return to the planning phase and adjust your approach.

¹ Adapted from: http://www.mindtools.com/pages/article/newPPM_89.htm

Ideas for Implementing Your Outreach and Enrollment Planning

(Find the category that most closely matches your organization.)

Type of Group or Organization	Community Health Center or Hospital	Community-Based Organization (health-focused)	Community-Based Organization (not health-focused)
Description of the Type of Organization and Whom It Normally Serves.	<ul style="list-style-type: none"> Provides outreach, education, and/or application assistance directly to consumers. May decide to target existing uninsured patients and/or potentially uninsured people. 	<ul style="list-style-type: none"> May provide outreach, education, and/or application assistance directly to consumers. May also provide outreach to messengers (such as associations or volunteers) to reach uninsured people in the community. 	<ul style="list-style-type: none"> Provides social services to a broad community, for example, faith institutions, libraries, and food pantries. Engages messengers in outreach and education activities for their existing consumers or the community at large.
Setting Up Your Infrastructure and Processes			
<p>General Ideas Develop policies, procedures, and guidelines. For example, incorporate trainings into existing staff meetings as part of your process, or establish regular meetings for staff from different departments to share information and ideas.</p>	<ul style="list-style-type: none"> Asses your organization's capacity to design enrollment services that meet patient and community needs. Train staff as certified application counselors. incorporate in-reach strategies into existing procedures and departments. 	<ul style="list-style-type: none"> Ensure that staff from all departments coordinate their efforts. 	<ul style="list-style-type: none"> Integrate processes to deliver the message to staff, stakeholders, and constituents about why it is important to your mission for consumers to have health insurance. For example, is it important for reasons such as economics, social justice, community orientation, religious beliefs, or the benefit to the public?
Preparing to Direct Consumers to the Right "Door"			
<p>General Ideas Work with staff to develop your outreach plan.</p>	<ul style="list-style-type: none"> Recognize the role that staff, patients, community members, and partners play, and build an outreach and an in-reach work plan based on your strengths. Integrate new processes into your current system(s) to facilitate outreach, in-reach and enrollment. 	<ul style="list-style-type: none"> Develop systems to connect with partners so they can refer potential consumers to you, and vice-versa. 	<ul style="list-style-type: none"> Create processes for disseminating information that capitalize on what your organization already offers, for example, newsletters, emails, posters, sharing at regular meetings, etc.
Measuring Your Success (Sample Monitoring and Evaluation Questions)			
<p>General Ideas When developing a list of outreach activities, build in monitoring and evaluation strategies that include how all pieces of the organization fit together.</p>	<ul style="list-style-type: none"> How many eligible patients were identified through current systems? Which systems did you use? Patients' income data? Referrals? Which strategies worked more effectively with your patients? 	<ul style="list-style-type: none"> How many consumers contacted your organization? How did they hear about your organization? Are there any patterns in the success of the strategies you used? Did any strategies work better with one population versus another? 	<ul style="list-style-type: none"> How many materials did your staff or volunteers distribute that included health coverage information? How many people has your organization reached to publicize coverage options?

