

Outreach and Enrollment Staff Performance Metrics

Settings goals for and monitoring individual staff performance is an extremely important part of conducting effective outreach and enrollment (O&E) for health insurance coverage programs. Just as your organization as a whole has measurable outcome goals, each O&E staff member should have individualized objectives to monitor performance, correct ineffective activities and reward outstanding work. MPCA has included a template and example of an individual O&E workplan along with an overview on creating SMART objectives (provided by Health Outreach Partners) in the Outreach and Enrollment toolkit available at www.mpca.net/outreach.

Keep in mind, individual staff objectives and workplans don't replace the organization's overall outreach and enrollment goals. But, MPCA encourages organizations to align individualized objectives with organizational goals to promote streamlined tracking mechanisms and ensure staff efforts are directly contributing to organizational success. Individualized objectives may include:

- Providing coverage outreach and education assistance.
 - This objective tracks the number of individuals the staff member educates about coverage options, helps to set up a profile in the application system or assists in completing a coverage application.
- Providing enrollment support.
 - This objective tracks the number of individuals enrolled (i.e. actually receiving health coverage) in any program (Medicaid, CHIP, Marketplace) with the staff member's support.
- Providing high-quality services.
 - This objective tracks patient and community member satisfaction with the staff member's services and can easily be measured using a simple feedback survey.
- Completing specialized outreach and/or education activities.
 - This objective can include more specialized areas of responsibility like updating an O&E webpage, posting coverage-related social media messages, placing flyers in partner and business locations in the community, recruiting O&E volunteers and more. It makes sense to assign these types of specialized objectives so that staff working as a collective O&E team have definitive, complimentary direction.
- Pursuing professional and continuing education.
 - This objective should include required CAC training and recertification as well as training available through MPCA and other partners which contributes to the staff member's skills and knowledge base.

Monitoring staff performance on a monthly basis using measurable objectives is an ideal approach as it creates regular touch points to review performance, discuss improvement strategies and document best practices. Monthly objectives should be specific, measurable and practical to the circumstances of your organization. For example:

Objective	Monthly Performance Expectation
Provide coverage outreach and education assistance.	Assist ___ people.
Provide enrollment support.	Enroll ___ people.
Provide high-quality services.	Ensure ___% of client O&E feedback is positive. (e.g. clients mark "Strongly Agree" or "Agree" on feedback survey)
Complete specialized outreach and/or education activities.	Form partnerships to distribute/post outreach material with ___ organizations. Attend ___ outreach events. Post enrollment messages no less than three times weekly via all social media channels.
Pursue professional and continuing education.	Attend ___ training opportunities per month. Complete all required recertification activities.