

# OUTREACH AND ENROLLMENT METRICS

## A TIP SHEET FOR COMMUNITY HEALTH CENTERS

Outreach and enrollment (OE) programs increasingly function in a world of accountability. For many organizations, staff time and financial resources are precious commodities that must be protected. In order to justify investing in any OE practice or strategy, the OE team needs to routinely evaluate its effectiveness and impact. The following are tips and key considerations for defining and tracking OE metrics:

1. **Clearly define the goal of each outreach and enrollment practice or strategy.**
2. **Identify what metrics will be used to determine the effectiveness of the practice based on the defined goal.** Key metrics to consider tracking include:

Goal	Metrics
Increase # of current uninsured but eligible patients enrolled in available health insurance options	<ul style="list-style-type: none"> <li># of existing eligible but uninsured patients</li> <li># of current uninsured but eligible patients that were contacted by an outreach and enrollment worker</li> <li># of completed applications for current uninsured but eligible patients</li> <li># of applications denied and the reason for denial</li> <li># of current newly insured patients</li> </ul>
Increase # of new patients educated and/or enrolled	<ul style="list-style-type: none"> <li># of new patients educated about available health insurance options through outreach activities (e.g., one-on-one encounters and/or group educational sessions)</li> <li># of new patients who are eligible</li> <li># of new patients who are not eligible or are not interested in enrolling</li> <li># of applications denied and the reason for denial</li> <li># of completed applications for new eligible patients</li> </ul>
Assist individuals and families in using benefits	<ul style="list-style-type: none"> <li>% of newly enrolled who make an appointment within three months of enrollment</li> <li>Enrollee comfort level with using their benefits</li> <li>Common problems or questions enrollees have regarding using benefits</li> </ul>
Increase the capacity of staff and/or partnering agencies to provide referrals and/or application assistance	<ul style="list-style-type: none"> <li># of staff trained to provide health insurance outreach</li> <li># of staff trained to provide application assistance</li> <li># of community partners trained</li> <li># of Memorandum of Understandings or Partnership Agreements completed with outside agencies</li> <li># of referrals received for application assistance</li> <li>% of those referred that complete an application</li> </ul>
Improve enrollment systems and processes	<ul style="list-style-type: none"> <li># of applications completed by enrollment workers per day/week/month</li> <li>Average application completion time</li> <li>Enrollee satisfaction with the application assistance process</li> </ul>



**3. Determine how to track your metrics.** Specifically:

- How will the data be collected? (e.g., entered into Electronic Medical Records, recorded in a spreadsheet or database, collected on an outreach encounter form, submitted through a satisfaction survey, collected through a focus group, etc.)
- When will the data be collected? (e.g., during the registration process, after an encounter or patient visit, during a community event, etc.)
- Who will collect the data? For example, what will outreach and enrollment workers, outreach directors or coordinators, front desk staff, clinical staff, and partnering agencies be expected to track?

**4. Identify when and how progress will be reviewed.** Should progress be reviewed weekly, monthly, quarterly, biannually or some combination of these timeframes? Will it be one individual who will conduct the review or a team of staff members?

**5. Decide how the results will be used and shared.** Consider the following:

- Who needs to see the results? And, in what format should the information be shared? (e.g., presentation, written report, etc.)
- What is the intended outcome of sharing and reviewing the data? (e.g., to measure progress for individual staff members, the team, and/or the organization)

Measuring the effectiveness of outreach and enrollment efforts is crucial to helping you understand if you have reached your goals. Thus, establishing a system of metrics in advance of implementing any practice should be a priority.

Don't forget to review feedback collected from partners and patients along with data collected internally at key points within the project timeline. Make appropriate and timely adjustments. Do not wait until the end of a project period when little can be done to remedy any difficulties experienced. Review results in enough time to make needed changes.

For additional resources or to inquire about more in-depth training or technical assistance on business and evaluation metrics for integrated outreach programs, please contact Kristen Stoimenoff at [Kristen@outreach-partners.org](mailto:Kristen@outreach-partners.org) or Liberty Day at [Liberty@outreach-partners.org](mailto:Liberty@outreach-partners.org).

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