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# OUTREACH CHALLENGES IN 2021

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**THE LINK BETWEEN YOU AND MEDICARE**

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# Today's Presenters

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# Today's Discussion

- Outreach Purpose and Impact
- Group and Media Definitions
- Past 2020 - Challenges and Successes
- Today - Do We Have a Plan?
- Future 2021 – Assumptions
- Outreach Plan - Discussion and Example
- SMP Outreach Information to Consider
- SHIPtools Event Entry and Reports - discussion and demonstration

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# Polling Question #1

Based on your COVID Guidelines today, is your site open to the public?

Yes

No

Don't know

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# Polling Question #2

Do you currently have a Documented Outreach Plan?

Yes

No

I don't know

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# Polling Question #3

Do you have ideas and suggestions for 2021 outreach activity?

Yes

No

Not at present

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# Outreach Purpose

- Quite simply, outreach is “reaching out” into a community through various “approaches” to inform the public of
  - Who you are
  - What services you provide
  - How to contact you
- In hopes of becoming their “go to” for your services.
- Outreach is enhancing a reputation.
- Outreach is the foundation from which results occur.
- It is a branding of logo recognition with service delivered.
- Outreach takes strategy, plan, repetition, and never give up attitude

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# Outreach Impacts...



- Calls to Call Center
- Referrals to Counselors
- Contacts & Screenings
- Beneficiary health & healthcare \$'s
- Amount of data collected in STARS and reported at local, state and national level
- Volunteer certification
- Call Center and AEP Exit Survey results for continuous improvement



# Group and Media Definition

Source: STARS Manual, Chapter 5, Pages 2-3

GROUP TYPE	DEFINITION
<p><b><u>Interactive presentation</u></b> to the public either in-person or via electronic means.</p> <p><b><u>Interactive</u></b> means there is an opportunity for attendees to ask questions of the presenter at the event.</p>	<p>* Includes in-person presentations, forums, speaking engagements, or seminars during which substantive knowledge on Medicare is transferred by oral and visual means from a SHIP presenter to those individuals attending the presentation.</p> <p>* Does not include SHIP counselor trainings, booths, exhibits, satellite broadcasts, or video.</p>
Booth/Exhibit at fair, conference, or other public event	<p>* Includes events where general or program specific information, and/or printed fact sheets are shared with or distributed to the public.</p>
Enrollment Event	<p>* Any type of program where enrollment is the key objective and where team members are on hand to help the beneficiary submit an application online or by paper.</p>

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# Group and Media Definitions, con't

MEDIA TYPE	DEFINITIONS
Billboard	Paper and electronic billboard advertisements
Email	Report an email blast or listserv message to a larger group. Does not include emails to individuals.
Magazine	Magazine advertisement, feature, or story highlighting Medicare or SHIP.
Newsletter	Newspaper advertisement, feature, or story highlighting Medicare or SHIP.
Newspaper	Newspaper advertisement, feature, or story highlighting Medicare or SHIP.
Radio	Public service announcement or live or taped radio appearance including Medicare or SHIP information.

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# Group and Media Definitions, con't

MEDIA	DEFINITION
Social Media	Use of any social media electronic platform to facilitate Medicare or SHIP information sharing.
Television	Public service announcement or a live or taped radio appearance for the purpose of sharing Medicare or SHIP information.
Website	Messaging shared through the state, regional, or local SHIP website for the purpose of sharing Medicare or SHIP information.
Other	Other media not listed above. Common examples may include direct mail, distributing flyers or brochures to partner locations like libraries, public transit ads, or public service announcements.

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# “2020” in Review

## ○ Challenges with COVID-19

- Happened with no notice
- Offices close-services suspended perhaps or modified
- Constant scramble to respond to everything-work, clients, personal lives
- Viable recovery plans

## ○ Outreach suffered

- Presentations and Booths cancelled March – December
- Performance Measures not met

## ○ What did we learn? (Share your lessons learned in CHAT)

- Post review of 2020 outreach-what went well, needs improvement, retain
- Flexibility, fast planning, process changes could be adjusted
- Face to Face while ideal is not the only way to deliver services
- Creativity and thinking out of the box are good skills to have

## ○ Success Stories to share

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# Where are we “Today” with COVID?

- © Assumption: COVID-19 and guidelines will remain in our lives requiring flexibility in responding to changes
- © Assumption: Outreach creativity needed for 2021
- © Assumption: Planning needed for outreach, to maintain focus, and develop ideas and suggestions that build on lessons learned and beyond

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# Ideas for 2021 Outreach

☾ Reminder: Send your ideas and suggestions in CHAT throughout the presentation. Sent to **all attendees**, not just panelists.

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# WHERE DO WE BEGIN FOR 2021

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# Outreach Goal and Objectives-Example

## ○ What is your overall outreach goal

- Example: Promote agency services throughout all rural health delivery locations in service area.

## ○ What are your overall outcome objectives

- Identify rural health delivery locations in each county
- Develop agency service information outreach strategy for 75% of facilities
- Gain Agreements to include agency information into patient information packets, link on website, and ongoing information for newsletters in 75% of facilities
- Gain Agreements with facilities to participate in 3 health fairs, face to face or virtual
- Gain Agreements to Open Enrollment Events in 4 facility locations



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# Understand Outreach Basics-Example

- What requirements do I have to meet? Do I have to report on these?
  - Grant requirements
  - Agency requirements not associated with grant
- What geographic locations in my service do I focus on?
  - Grant Requirements
  - Agency requirements not associated with grant
- What outreach activities do I need to address during 2021 outreach?
  - Agency goals and objectives
- What is my outreach budget?
  - Grant budget
  - Agency budget

# Inventory Existing Outreach Material- Example

- What outreach material do I have in inventory?
  - Make a list
  - Include paper supply
  - Include Postage
- Based on goals and objectives, do I need to re-order material, acquire material from other source, or design material?
  - Consider timeline
- Identify other resources available through other agencies

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# Identify Sources for Outreach Information-Example

- Brain storm with group
- Consider other organizations in service area
- **SMP**
- National Days of Recognition
- Older Americans Day
- Others

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# Identify Distribution Methods-Examples

- What distribution methods do I have available?
  - Facebook
  - Website
  - Presentations
  - Radio
  - Newsletters
  - List Servs
  
- Who do I ask in my community to serve as a distribution point?
  - Pharmacies
  - Dr. Offices
  - Other senior service type agencies

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# Reporting Outreach-Example

- What data do I have to include in outreach reports?
  - Grants
  - Agency
  - Other
- Who do I report outreach results to?
  - Grant
  - Agency
  - Other
- Where do I collect the required information?
- How do I generate outreach reports?

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# Document Your Outreach Plan

- Document your outreach plan, timeline, and work task
  - Master Tracking
  - Activity Level

# CLAIM Plan Master - Example

Activity	Description	Stat Date	End Date	Responsible
Medicare 101 Presentation	Interactive presentation to Rural Counties, covering Part A, B Advantage Plans, Part D, Extra Help, and Presentation and Wellness	March 1	March 1	Chuck
Community Education Stuffer	General information about Community Education on palm card size paper. Included in the Call Center Daily Mailing	February 11	December 21	Call Center Kevin Judy

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# Work Plan

## Example of Information Needed

Work Plan Task Level Activity

Activity Title

Activity Goal and measurable objectives

Requirements

Geographic Coverage

Estimate Reach

Population Characteristics

Budget

Material Needed

Distribution Method

Report Data components required

Report Distribution





# Community Education Stuffer

## LEARN MORE ABOUT YOUR MEDICARE BENEFITS!



Come join us for a series of free presentations to increase your understanding of Medicare benefits!

- Join the presentations through ZOOM from the comfort of your home. If you do not have access to ZOOM, join us by phone.
- All presentations will provide important information on Medicare benefits, including handouts and a list of trusted resources.
- Presenters are experienced, certified Medicare counselors and CLAIM AmeriCorps Members.
- To view topics and register, go to [missouriclaim.org](http://missouriclaim.org) > Community Events.
- All presentations are free and unbiased. We do not sell insurance.



- Designed to promote Community Education Statewide
- Included in daily Call Center mailing
- Size of CLAIM Palm Card
- Various Diversity Pictures with same message
- Use in multiple ways
- Potential annual reach 8,000 – 10,000 beneficiaries
- Request for Distribution: Share, identify locations in community, forward other ideas and suggestions.
- CLAIM Watch 2.16.2021-Introduction
- Cost-minimal. Paper on hand, piggy back on regular daily mailing

# Examples of Distribution Points for Call Center Community Education “Stuffer”

## Community Education

- Part of Handout for Attendees
- Other Agencies

## Newsletter

- CLAIM Volunteer
- Partners
- Libraries
- Others

## Facebook Posts

- CLAIM
- DCI
- Partners
- Others

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# SMP Outreach Information to Consider

## ◉ SMP Resources Available

◉ Fraud Facts

◉ Brochures

◉ Facebook posts

◉ Telephone Reassurance Scripts

◉ Personal Health Journals—now produced as My Healthcare Tracker

◉ **REMEMBER:** Don't individually produce SMP materials. **ALL** information must come from SMP office to assure message is consistent and "safe". If questions, contact Rona McNally. (Refer to introduction slide for contact information)

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# Scam Update

○ Genetic Testing

○ COVID-19

○ DME

○ What to do if you think something has gone wrong

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# Volunteer Outreach Team

- All Volunteers make up Outreach Team
- On a mission to spread the word
- Best suited to implement Outreach Activity within community
- Great source for ideas and suggestions that would be helpful for community

- Weekly Outreach Update
- CLAIM Watch
- Update on Outreach Events
- Intro of New Outreach Event
- Description of New Event
- Potential Outreach New Event
- Picture, if indicated
- Potential Reach
- Next Steps-Call to Action

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# SHIPtools Demo - Review

- Events Tab
- New Events Entry-example
- Complete Status
- Follow Up Needed Status
- Aggregate Reports
- Reports with Filters
- Monitoring your personal outreach

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# In Summary

- Outreach Purpose, Impact, Group and Media Definitions
- Past 2020 - Challenges and Successes
- Today - Do We Have a Plan?
- Future 2021 - Ideas, samples, plan
- Outreach Plan - Discussion and Example
- SMP Outreach Information to Consider
- SHIPtools Event Entry and Reports - discussion and demonstration
- Check in with Judy Keseman if you develop an outreach item using CLAIM logo. Logo and funding wording may be required.

