



Section 6

TRACKING AND EVALUATING YOUR EFFORTS

The ultimate measure of success for most organizations will be increasing the number of qualified enrollment applications generated and the number of current enrollees retained. Measurable goals should be agreed upon in the initial planning stages of your outreach efforts, as well as all strategies and tactics designed to achieve those goals. Determining if you are reaching your goals, and which strategies are successful in helping you meet them, will require tracking and evaluation of your activities.

This section provides supplemental resources to help measure and evaluate your efforts. The majority of this section focuses on process evaluation – helping you track and evaluate how you are doing during implementation of outreach activities. Also included here is an overview of outcome evaluation – how to determine if you have accomplished what you set out to do. While your organization may not necessarily engage in all of the activities described within this toolkit, you are encouraged to use the tools that directly apply to the type of outreach you are conducting.

6.1 Process Evaluation

Ongoing evaluation throughout the campaign is critical to ensure your communication program and outreach activities are reaching your target audiences and resulting in the intended action. Before you begin implementing any outreach effort, determine how you will evaluate your activities. The section is focused on process evaluation, which will help track the progress of your implementation tactics and identify areas for improvement along the way. Process evaluation will highlight:

- The extent to which activities are being implemented and tools are being used
- The degree to which each of your target audiences is being exposed to key children’s health insurance messaging
- The level to which partners and media are receiving and using your messages and materials

To make process evaluation easier, it is important to develop data tracking mechanisms before implementation begins (see Section 6.3). Consider assigning one person from your organization to maintain and update these tracking documents.

Material Distribution

Track each item you distribute to a partner, at an enrollment event or directly to your target audience. This includes materials developed by CMS and HHS (see Section 2) as well as materials your organization has developed (see Section 6.3 for sample tools, including a material distribution tracking grid). This will allow you to report on the quantity of information disseminated and account for any expenses related to the printing of information.



It is equally important to evaluate the information gathered in your material distribution tracking grid. Review this tracker regularly to determine if specific items are:

- Being requested in greater (or lesser) frequency and quantity
- Appealing to a certain population or organizations that serve specific target audiences
- Being repeatedly requested by a single group (if so, you may want to enlist that organization as a partner or consider limiting the quantity provided to an organization if there does not seem to be a resulting impact)
- Proving more/less useful in a particular format (e.g., electronic, hard copy)

This review will help guide whether additional quantities of an item should be printed, if an add-on or enhancement to an item should be considered or if an item should be updated or discontinued. If you notice specific items are not being used, it may be because they are not having the intended impact. However, before discontinuing an item, informally survey potential users of the material to determine if those users do not find the item helpful or if they simply do not know it exists. There are times when just promoting the availability of an item will increase requests for it.

Media Outreach

Media coverage of children’s health insurance should be tracked by your organization (see Section 6.3 for a media tracking grid). Month to month, a review of your media coverage log will highlight if coverage of children’s health insurance is increasing, decreasing or remaining steady. However, quantity of coverage will not provide a complete picture of your effort’s impact. To determine the effectiveness of media outreach efforts at increasing enrollment, coverage must also be evaluated against measures such as those described below:

EVALUATING MEDIA COVERAGE	
Variety of Coverage	<ul style="list-style-type: none"> • What story angles have been most successful in generating coverage? • What story angles have been least successful? • How successful have we been in generating coverage in our region across mediums – print, TV, radio and online outlets? • How successful have we been in utilizing media aimed at specific segments of our target audiences?
Delivery of Key Messages	<ul style="list-style-type: none"> • How many stories included our key messages? • How often was our contact information (phone number, Web site) mentioned? • Are our partners being quoted and relaying our messages? • Are our target audiences and non-partners using our messages?
Use of Spokesperson	<ul style="list-style-type: none"> • Are we being used as experts on the issue of children’s health insurance? • Is our spokesperson quoted on only one aspect of children’s health insurance or seen widely as an expert? • Is our spokesperson only being used in specific mediums or to reach specific target audiences?



The results of the evaluation should guide your proactive media outreach activities moving forward. For example, if you notice your messages are delivered but there is rarely information on of how someone can act on them, increase promotion of your phone number and Web address in each media interaction. And, if you are only being contacted by the local paper for interviews and information, you should increase efforts to engage television, radio and online reporters.

Partnership Recruitment and Activation

If your organization is working with partners to extend the reach of your communications efforts, you likely have a comprehensive list of those partners and their contact information. That list should also identify the activities your partners have agreed to undertake and the resources you expend in supporting their activities (e.g., offering hard-copy materials, securing a speaker for a meeting, providing an article for a newsletter, etc.). The impact of the activities for which you expend resources should be identified whenever possible. This can be done by asking consumers who attend an event or call your phone number to let you know where they received information about the program or your organization. This will help you identify which activities, and with which partners, are having the greatest impact on your goals.

In addition to tracking impact, it is also helpful to evaluate the value of your partnerships. When determining value, quantity will only be one measure of success. Consider questions such as:

- Has the partner's effort resulted in increased inquiries/applications for CHIP and/or Medicaid?
- What impact has the partner had on increasing enrollment applications or in retaining current enrollees?
- Has the partner extended the reach of our message?
- Has the partner provided inroads with a particular target and/or hard-to-reach audience?
- Does having this partner involved open other doors for our organization?

It is likely that all partners will provide some level of value. However, asking these and similar questions can help your organization prioritize how best to allocate your time and resources.

Events

Conducting a community enrollment event, even an informational session, can take significant time and resources to plan and execute. So, events should be very specifically targeted or even incorporated into another event that will draw from the same community.

Events can offer a direct impact on your enrollment goals. Always provide a short and simple questionnaire for event participants to complete as this will provide direct feedback to inform how you can improve on the next event you plan. Section 6.3 includes a sample event feedback form. If you choose to develop your own, keep the number of questions to 10 or fewer, use multiple choice answers if possible and encourage event participants to fill in answers on-site to increase the chance of completion.



Use this data to track event success and note key trends. For example, note if you have more success with events that take place in the fall than those in the summer; if attendees tend to be from the same target audience segment; or if you have better success focusing solely on new enrollees versus re-enrollment.

Measurement of Calls, E-Mails and Web Site Visits Generated

Families want as simple and convenient an opportunity as possible to get information. If your organization notices a spike in the number of calls to your phone number, e-mails in your inbox and/or visits to your Web site, outreach efforts may be contributing to this increased activity. Use a simple tally sheet to count the number of calls or e-mails your organization receives each day and use simple, free Web tools such as Google Analytics to track daily hits to your Web site. At the end of each month, review increases in activity to determine if the spikes align with a particular outreach effort (e.g., newspaper article, enrollment event, partner mailing, etc.). This provides another method of determining what activities are helping you reach your goals of increasing enrollment and retention in children's health insurance programs.

As you receive inquiries, consider using those opportunities to get a pulse of families who recently enrolled to find out how they learned about CHIP and/or Medicaid and what motivated them to inquire. You can also use the sample enrollee survey (see Section 6.3) as a template to capture this information.

6.2 Outcome Evaluation

In addition to process evaluation, you should also conduct outcome evaluation, which generally measures whether your efforts had the desired effect. For example, did you achieve a certain level of change in awareness, comprehension, attitudes or behavior regarding children's health insurance over a period of time? This type of evaluation occurs at the end of a program or periodically over the life of the campaign.

Outcome evaluation requires time and resources. This type of evaluation is generally done through a survey or other research methods. Usually, a baseline measurement should be conducted before a campaign begins; research is then conducted upon program conclusion or at specific periods throughout the course of the campaign to measure changes from baseline.

As mentioned previously, the ultimate measurement of success is an increase in the number of qualified enrollment applications and the number of families who renew their children's enrollment. To measure success at minimum you must review the number of new enrollees and those retained in children's health insurance programs for a period (e.g., quarterly, annually) prior to beginning an outreach campaign and during and after the campaign concludes.



6.3 Samples Materials

Sample A – Material Distribution Tracking Grid

Name	Organization	Address	Use of Materials	[Name of Material 1] Quantity Requested	[Name of Material 2] Quantity Requested	[Name of Material 3] Quantity Requested	[Name of Material 4] Quantity Requested
Total Quantities Requested							



Sample B – Media Coverage Tracking Grid

Media Outlet	Reporter Doing Story	Circulation or Audience Figures*	Date of Story	Type of Coverage (Print, Wire, Internet, TV or Radio)	Topic of Story	Key Messages Delivered	Spokesperson(s)/ Experts Quoted	Inclusion of Contact Information

*You can get circulation and/or audience figures from media monitoring services, media contact databases such as Cision or by calling the media outlet directly. Note that calling news outlets is more labor-intensive but cost-free, while services like Cision are faster but more expensive.



Sample C – Event Feedback Form

EVENT FEEDBACK FORM	
Date of Event:	
Location of Event:	
1. Was the information you received about children's health insurance helpful to you? Please circle below:	
Not Helpful	Somewhat Helpful Helpful Very Helpful
2. If so, what will be most helpful? If not, why?	<hr/> <hr/>
3. Were all your questions answered? Please circle below:	
Yes	No Some
4. Would any of the following have improved your experience? Mark all that apply.	
<input type="checkbox"/> A better understanding of the documents I needed to bring with me	
<input type="checkbox"/> The ability to go through this process over the phone or online	
<input type="checkbox"/> Earlier notice that this event was happening	
<input type="checkbox"/> Someone who spoke a language other than English	
5. Did the person you worked with appear knowledgeable about children's health insurance programs? Please circle below:	
Not At All	Somewhat Knowledgeable Very Knowledgeable
6. Was the information they gave you easy to understand? Please circle below:	
Very Easy	Somewhat Did Not Understand the Information
7. Would you tell your friends or family in a situation similar to yours to look into the children's health insurance programs you received information about today? Please circle below:	
Yes	No Maybe



Sample D – Enrollee Survey

ENROLLEE SURVEY

1. Have you previously enrolled your child in the Children’s Health Insurance Program (CHIP) and/or Medicaid? If so, why did your child lose coverage?
 - Income went up
 - Didn’t send in forms in time
 - Couldn’t pay premium
 - Didn’t think we were still eligible
 - Didn’t need coverage
 - Other _____
2. Is this your first time enrolling in [CHIP and/or Medicaid]? What kept you from enrolling sooner?
 - First I’ve heard of it
 - Didn’t think I was eligible
 - Application was too complicated
 - Didn’t have all of the paperwork they wanted
 - Was not eligible the last time I tried
 - Other _____
3. Why did you decide to enroll now?
 - My child is sick
 - It sounds like a good program
 - Time for school and my child needed immunizations
 - I lost my coverage through my job
 - Other _____
4. How did you hear about CHIP and/or Medicaid and the current enrollment process?
5. What is the best way to provide information to you about CHIP and/or Medicaid?
 - By mail
 - By phone
 - Text message
 - E-mail
 - Other _____
6. How would you describe the enrollment experience – easy, difficult or moderate – and why?