SETTING PERFORMANCE TARGETS FOR SHIP PARTNERS
Agenda

- Brief introduction
  - Leslie Green, ACL

- SHIP Examples of Target-Setting
  - Sharon Jalieba, AL
  - Todd Dixon, WA
  - Darren Hotton, UT

- Discussion & Questions
### The New Performance Measures

<table>
<thead>
<tr>
<th>PM1: Client Contacts</th>
<th>• Percentage of total client contacts (in-person office, in-person home, telephone [all durations], and contacts by e-mail, postal, or fax) per Medicare beneficiaries in the State. <em>(Unchanged)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>PM2: Outreach Contacts</td>
<td>• Percentage of persons reached through presentations, booths/exhibits at health/senior fairs, and enrollment events per Medicare beneficiaries in the State. <em>(unchanged)</em></td>
</tr>
<tr>
<td>PM3: Medicare Beneficiaries Under 65</td>
<td>• Percentage of contacts with Medicare beneficiaries under the age of 65 per Medicare beneficiaries under 65 in the State. <em>(unchanged)</em></td>
</tr>
<tr>
<td>PM4: Hard-to-Reach Contacts (NEW)</td>
<td>• Percentage of low-income, rural, and non-native English contacts per total “hard-to-reach” Medicare beneficiaries in the State.</td>
</tr>
</tbody>
</table>
| PM5: Enrollment Contacts | • Percentage of unduplicated enrollment contacts (i.e., contacts with one or more qualifying enrollment topics) discussed per Medicare beneficiaries in the State *(mostly unchanged)*.
## SHIP PM Report: State Summary

### ACL State Summary Performance Measures for October 1, 2015 - December 31, 2015 vs. October 1, 2016 - December 31, 2016

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>502 ACL</td>
<td>1 (Client Contacts)</td>
<td>132,217</td>
<td>4,402</td>
<td>3.33%</td>
<td>135,916</td>
<td>4,083</td>
<td>3.00%</td>
<td>-9.77%</td>
<td>Good</td>
<td>Good</td>
<td>9.15%</td>
<td>Excellent</td>
<td>15.28%</td>
<td></td>
</tr>
<tr>
<td>502 ACL</td>
<td>2 (Public Media Outreach Contacts)</td>
<td>132,217</td>
<td>420</td>
<td>0.32%</td>
<td>135,916</td>
<td>755</td>
<td>0.56%</td>
<td>74.87%</td>
<td>Fair</td>
<td>Fair</td>
<td>3.18%</td>
<td>Average</td>
<td>3.40%</td>
<td></td>
</tr>
<tr>
<td>502 ACL</td>
<td>3 (Under 65 Contacts)</td>
<td>22,013</td>
<td>488</td>
<td>2.22%</td>
<td>22,056</td>
<td>489</td>
<td>2.22%</td>
<td>-0.04%</td>
<td>Good</td>
<td>Good</td>
<td>7.92%</td>
<td>Excellent</td>
<td>11.47%</td>
<td></td>
</tr>
<tr>
<td>502 ACL</td>
<td>4 (Total Hard-to-Reach)</td>
<td>133,023</td>
<td>4,514</td>
<td>3.20%</td>
<td>137,770</td>
<td>3,856</td>
<td>2.80%</td>
<td>-12.40%</td>
<td>Average</td>
<td>Good</td>
<td>8.88%</td>
<td>Excellent</td>
<td>12.77%</td>
<td></td>
</tr>
<tr>
<td>502 ACL</td>
<td>5 (Enrollment Contacts)</td>
<td>132,217</td>
<td>4,200</td>
<td>3.18%</td>
<td>135,916</td>
<td>3,875</td>
<td>2.85%</td>
<td>-10.25%</td>
<td>Good</td>
<td>Good</td>
<td>8.48%</td>
<td>Excellent</td>
<td>9.39%</td>
<td></td>
</tr>
</tbody>
</table>

### ACL SHIP Performance Measures

**Performance Measure 1 - Client Contacts**

Percentage of total client contacts (in-person office, in-person home, telephone (all durations), and contacts by email, postal or fax per Medicare beneficiaries in the State.

**Performance Measure 2 - Public Media Outreach Contacts**

Percentage of persons reached through presentation, booths/exhibits at health/senior fairs, and enrollment events per Medicare beneficiaries in the State.

**Performance Measure 3 - Under 65 Medicare Beneficiaries Contacts**

Percentage of contacts with Medicare beneficiaries under the age of 65 per Medicare beneficiaries under 65 in the State.

**Performance Measure 4 - Hard-to-Reach Contacts**

Percentage of low-income, rural, and non-native English contacts per total "hard-to-reach" Medicare beneficiaries in the State.

**Performance Measure 5 - Enrollment Contacts**

Percentage of unduplicated enrollment contacts (i.e. contacts with one or more qualifying enrollment topics) discussed per Medicare beneficiaries in the State.

Period: October 1, 2015 - December 31, 2015 vs. October 1, 2016 - December 31, 2016
# PM Report Distribution for 2017-2018

**Grant Year**

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Distribution Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>April-June 2017</td>
<td>August 2017</td>
</tr>
<tr>
<td>April-September 2017</td>
<td>November 2017</td>
</tr>
<tr>
<td>April-December 2017</td>
<td>February 2018</td>
</tr>
<tr>
<td>April 2017-March 2018</td>
<td>May 2018</td>
</tr>
</tbody>
</table>
Setting State Level Targets: June 2017

State-Level Performance Measure Goal Setting Calculation Instructions

This instruction sheet details how to add formulas to the Quarterly Performance Measure (PM) report to determine:

1. Additional effort (CCFs and persons on PAMs) required to meet the State Level Target Penetration Rate for next year,
2. Medicare beneficiary percent change from year-to-year, and
3. Medicare beneficiaries count from year-to-year.

Calculate 2015 Achieved Counts

1. Open the PM Quarterly report to the State Summary Tab
2. Click Cell P4 and type in 2015 Achieved Counts
3. Click cell P5
4. Hit the equals key on the keyboard (=)
5. Click cell D5
6. Click the * key on the keyboard to multiply
7. Click cell M5. The equation should appear in cell P5 =D5*M5
8. Hit enter
9. Cell P5 contains the number of CCF forms submitted in the 2015-2016 grant year.
   a. On cell P5, hover over the bottom right corner of the cell until the cursor changes from a large white “+” to a thin black “+”. Click and drag the cursor to cell P9. This will copy the formula into the cells below.
   (To check accuracy, the cells should contain the following formulas: P6 =D6*M6 P7 =D7*M7 P8 =D8*M8 P9 =D9*M9)
   b. Format cells to round to next whole number
Setting Sub-State Targets