

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

PM1: Client Contacts

- 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. (**Unchanged**)

PM2: Outreach Contacts

- Percentage of persons reached through presentations, booths/exhibits at health/senior fairs, and enrollment events per Medicare beneficiaries in the State. (**unchanged**)

PM3: Medicare Beneficiaries Under 65

- Percentage of contacts with Medicare beneficiaries under the age of 65 per Medicare beneficiaries under 65 in the State. (**unchanged**)

PM4: Hard-to-Reach Contacts (NEW)

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

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

Microsoft Excel - ACL Template new PMs1-5.xlsx

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

			Oct 1, 2015 - Mar 31, 2015			Oct 1, 2016 - Mar 31, 2016			Cumulative Performance		Annual Performance Rating			
Fips Code	State	Performance Measures	Medicare Population	Total # Reached	Penetration Rate	Medicare Population	Total # Reached	Penetration Rate	Percent Change in Penetration Rate Oct 1 - Mar 31, 2015 Oct 1 - Mar 31, 2016	Quarterly Performance Rating Oct 1 - Mar 31, 2016	Annual 2015 - 2016 Achieved Performance Rating	Annual 2015 - 2016 Achieved Penetration Rate	Annual 2016 - 2017 Target Performance Rating	Annual 2016 - 2017 Target Penetration Rate ¹
502	ACL	1 (Client Contacts)	132,217	4,402	3.33%	135,916	4,083	3.00%	-9.77%	Good	Good	9.15%	Excellent	16.28%
502	ACL	2 (Public Media Outreach Contacts)	132,217	420	0.32%	135,916	755	0.56%	74.87%	Fair	Fair	3.18%	Average	3.40%
502	ACL	3 (Under 65 Contacts)	22,013	488	2.22%	22,066	489	2.22%	-0.04%	Good	Good	7.92%	Excellent	11.47%
502	ACL	4 (Total Hard-to-Reach)	135,023	4,314	3.20%	137,770	3,856	2.80%	-12.40%	Average	Good	8.88%	Excellent	12.77%
502	ACL	5 (Enrollment Contacts)	132,217	4,200	3.18%	135,916	3,875	2.85%	-10.25%	Good	Good	8.48%	Excellent	9.39%

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

Reporting Period	Distribution Date
April-June 2017	August 2017
April-September 2017	November 2017
April-December 2017	February 2018
April 2017-March 2018	May 2018

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