



How to Create an Outreach Work Plan

It's a good idea to establish an outreach work plan to help you structure and evaluate your outreach efforts. Your staff members can use the work plan as a tool to ensure they stay focused and on target with their activities. Remember, there are different ways you can develop an outreach work plan, and people often use different terminologies to describe their plan. Feel free to use this detailed guide to get started. We've also provided two sample work plans to use as templates.

Eight Questions to Ask Yourself Before Jumping In

- 1 What goal(s) are we trying to achieve?
- 2 What strategies will we use to achieve our goal(s)?
- 3 What activities and tasks do we need to perform to succeed?
- 4 Who will be responsible for executing each activity?
- 5 What specific outcome(s) do we expect to see from each activity?
- 6 How will we measure success when evaluating each activity?
- 7 What is our timeline for each activity?
- 8 What process will we implement to track our progress?

10 Items to Check to Ensure Your Outreach Work Plan Is Practical and Successful:

- Establish an "outreach master work plan" that includes all the activities related to your outreach work for the entire department. Then, establish an individual plan for each staff member that includes the activities only he or she is responsible for. (The eight questions listed above apply to both the outreach master work plan and the individual plan.)
- Define your goals, strategies, and activities based on your target audience. Always keep your audience in mind when designing your strategies and crafting your message.
- Connect your program's outreach goals to your organization's goals. Your outreach activities should support your organization's big-picture goals.
- Include your outreach staff in the development of the outreach work plan. It's important that they feel invested in the outreach plan's success. This will also help clarify roles and responsibilities.
- Apply the SMART framework to develop your goals and activities: specific, measurable, attainable, relevant, and time-bound.

- Detail your activities as much as possible. For example, include potential partner organizations, how you will contact consumers or patients, how you will work with others in your community, and which kinds of materials you will develop and/or use.
- Consider using indicators in your evaluation that capture internal and external results when applicable. For example, you'll want to measure how many people called your organization (internal). You'll also want to know, of the referrals you made to other organizations, how many followed through and signed up for health insurance (external).
- Specify indicators that measure both *process* and *outcome* results. For example, the number of events held (process) and the number of calls received (outcome).
- Measure your results against baseline data, when possible and applicable.
- Update your work plan to reflect whether an activity is complete, incomplete, or in progress. This will help ensure that you are focused and on target. Also, update your outreach work plan to reflect any modifications you make based on your monitoring and evaluation.

Sample Template Based on the Guidance Above

Outreach Work Plan for: List your program or organizations' name—this is for the master work plan

Outreach Staff Member Name: List the staff member's name—this is the individual work plan

Goal: List what you are planning to achieve during the work plan period

Strategy: List your overall strategy to achieve the goal above

| Activities | Timeline | Expected Outcomes | Staff Responsible | Measure of Effectiveness | Status/ Comments |
|---|--|--|---|---|---|
| List tasks you will perform. Include outreach methods and tools you will use. Add where and how you will conduct each activity. | Specify the timeline for completing each activity. | List what you hope to achieve with your outreach activities. | List who will implement each outreach activity. | List the indicators that will help you measure and evaluate your process and outcomes. For example, the number of events held (process) and the number of calls received (outcome). | Note if the activity is complete, incomplete, or in progress. It's also helpful to specify if this is a one-time activity or ongoing. |

Outreach Work Plan for: _____

Work Plan Period:

Goal:

Strategy:

| Activities | Timeline | Expected Outcomes | Staff Responsible | Measure of Effectiveness | Status/ Comments |
|------------|----------|-------------------|-------------------|--------------------------|------------------|
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Outreach Staff Member Name: _____

Work Plan Period:

Goal:

Strategy:

| Activities | Timeline | Expected Outcomes | Measure of Effectiveness | Status/ Comments |
|------------|----------|-------------------|--------------------------|---------------------|
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Examples of Outreach Work Plans from Three Organizations

Michigan Primary Care Association's Individual Outreach Work Plan

(selected text)

Outreach Staff Member Name: _____

Work Plan Period: November 1, 2013, through March 31, 2014

Goal: Enroll 200 uninsured adults in health insurance (including Medicaid) through the marketplace during the work plan period

Objective 1:

Form partnerships with four community-based organizations that specifically serve young adults

| Activities | Timeline | Expected Outcomes | Comments/Progress |
|--|-----------------|--|----------------------|
| Create a list of 8-10 organizations to contact that may not already be linked to health insurance. Narrow this list to 4 high-traffic, high-importance organizations serving young adults. | Nov. 1-Dec. 1 | Establish contacts with key community organizations. | In progress |
| Identify a stable contact person at each organization and ask which events are coming up. | Nov. 1-Dec. 1 | Build partnerships with at least 4 organizations. Events are promoted on calendar. | Planning in progress |
| Request and distribute flyers to visible places at these 4 organizations. | Dec. 1-March 31 | People will learn about opportunities for health insurance and contact me. | Planning in progress |
| For at least 1 site, host or be present at an event that draws young adults. | Dec. 1-March 31 | Young adults buy health insurance. | Planning in progress |

Objective 2:

Engage financial counselors in promoting health coverage

| Activities | Timeline | Expected Outcomes | Comments/Progress |
|---|-------------------|---|----------------------|
| Establish a process to ensure patients receive information about health coverage when they contact financial counselors with questions such as: co-pays, balances due, ect. Add information about health insurance on statements/letters they receive in the mail, etc. | Nov. 1-Nov. 15 | Financial counselors give information about health insurance to patients. | In progress |
| Host 2 training webinars for financial counselors. | Nov. 15-Nov. 30 | At least 80% of financial counselors attend one of the sessions. | Planning in progress |
| Implement text message and e-mail campaigns to inform patients using the financial services. | Nov. 15-March. 31 | People will learn about opportunities to buy insurance and contact the enrollment department. | Planning in progress |

Special thanks to the Michigan Primary Care Association for providing this sample work plan.

Outreach Work Plan for: Get Covered America—Health Care in the Pulpit (selected text)

Work Plan Period: December 1, 2012, through January 15, 2013

Goal: Help organizations throughout the country maximize the number of faith leaders that take action in their communities in support of the new health care options available under the Affordable Care Act

Strategy: Develop a “Health Care from the Pulpit” Outreach Guide promoting ideas to engage faith leaders

| Activities | Detailed Steps for Organizations/Individuals |
|--|---|
| <p>Encourage organizations/individuals to host a tabling event at local churches to identify and inform uninsured people about their options.</p> | <ul style="list-style-type: none"> • Map your community, assess where congregations are in your turf, and assess their demographics. Research the congregations’ programs, ministries, and the influence of their faith leaders. Identify a contact person for each congregation (visit their websites or call them). • Identify 5-10 faith partners who are active influencers in the local community, ideally those with a strong health or social justice focus. You may also choose partners who have tremendous reach within your target population. |
| <p>Encourage organizations/individuals to ask faith leaders to deliver a Sunday sermon/ message around the moral imperative of being insured.</p> | <ul style="list-style-type: none"> • Meet with the faith leader to introduce the enrollment period. • Get agreement from him or her to speak about health coverage options during the Sunday service. • Get a commitment from the faith leader to use social media to promote the new health insurance options. |
| <p>Encourage organizations to ask faith leaders’ permission to host a health care enrollment summit.</p> <p><i>Note: This event is most effective when you tap into an existing network of faith leaders you can partner with, or when there is solid clergy presence at your existing roundtable.</i></p> | <ul style="list-style-type: none"> • Reach out to your partners to assess interest in convening this type of event. • Develop an agenda and panel of speakers—include a diverse group of navigators, providers, advocates, faith leaders, and community leaders. • Secure a location. Be sure that they have space to set up lots of tables with laptops so you don’t have any trouble enrolling consumers on the spot. • Develop a media plan, so that you can broadly publicize this work. |

King County Outreach and Enrollment Plan (work plan period Oct. 1- March 31, 2014; selected text)

Goal: Enroll 180,000 uninsured King County (Seattle, Washington) residents in Medicaid or the Washington Healthplanfinder (the state’s marketplace or “exchange”).

Strategies:

- Identify data on uninsured people in each city in King County.
- Identify existing groups or sites that are doing outreach and enrollment in the community. Then identify the average number of uninsured people that each group or site reaches.
- Establish new partnerships and reinforce existing ones to host enrollment events with a variety of organizations, including community-based organizations and those selected as in-person assisters.
- Identify other strategies or partners that target locations with uninsured populations. These may include colleges or universities, libraries, community centers, housing organizations, groups that serve the homeless, immigrant and refugee groups, and food banks.

| Region/ Neighborhood | Uninsured | Location | Proposed Activities |
|-------------------------|--|--|---|
| Algona | N/A | <ul style="list-style-type: none"> • Algona Food Bank/New Hope Lutheran Church • Algona-Pacific Library | <ul style="list-style-type: none"> • Enrollment events • Materials • Certified enrollment staff • Language focus: Spanish |
| Auburn | <p>Total Uninsured: 10,268</p> <ul style="list-style-type: none"> • <138% FPL* = 3,876 • 138%-399% FPL = 4,841 • >400% FPL = 1,551 | <ul style="list-style-type: none"> • Public Health Department • Christ Community Clinic • Children’s Home Society • First United Methodist Church • Grace Community Church • City of Auburn (pending) • Public Library | <ul style="list-style-type: none"> • Enrollment events • Materials • Certified enrollment staff • Language focus: Spanish & Russian |
| Bellevue | <p>Total Uninsured: 11,475</p> <ul style="list-style-type: none"> • <138% FPL = 3,809 • 138%-399% FPL = 5,143 • >400% FPL = 2,523 | <ul style="list-style-type: none"> • Public Health Department • Lake Hills Elementary, Oct. 2 • Stevenson Elementary, Oct. 1, 5:30-8:30 • Crossroads Shopping Center, Oct. 19 • Overlake (pending) • Hopelink (pending) • YWCA • Newport Way Library • Bellevue City Hall (pending) | <ul style="list-style-type: none"> • Enrollment events • Materials • Certified enrollment staff • Language focus: Spanish and c Russian |

Special thanks to the Public Health—Seattle & King County (PHSKC) for providing this sample work plan.

Examples of Indicators to Help Complete the “Measure of Effectiveness” Column of Your Outreach Work Plan

Before you implement your plan, identify how to evaluate it. There are different ways to measure your outreach plan’s success, and you don’t need a complex method. This guide is intended to help you establish a simple evaluation process to help you organize your information, use your resources effectively, and ensure that you are on the right track to achieve your goals.

Ask Yourself:

- How will I know if my strategy is working?
- What baseline information should I obtain and/or use before implementation?
- What outcomes should I measure?
- What indicators will I use to assess my intended outcome?

Strategies You Can Use to Help:

- Keep contact log of calls received with the following information:
 - Why they called
 - How they heard about your effort
 - Outcome of the call
- Keep contact log of face-to-face visits received:
 - Why they visited
 - How they heard about your effort
 - Outcome of the visit

| Type of Activities/Method | Sample Indicators to Help You Measure Your Efforts |
|---|--|
| Printed Materials Distribution (fliers, posters) | <ul style="list-style-type: none"> • Number of: <ul style="list-style-type: none"> • Calls received • Face-to-face meetings • Individuals enrolled through this strategy (if applicable to you) • Materials distributed • Location in which consumers found your printed materials – specify which materials they saw <p><i>*If you have a website, you can also monitor traffic to see if it increased after you distributed the material.</i></p> |
| Presentations | <ul style="list-style-type: none"> • Number of: <ul style="list-style-type: none"> • Calls received • Face-to-face meetings • People in the audience • Individuals enrolled through this strategy (if applicable to you) • Presentations given • Presentation location <p><i>*It is important for your evaluation process to ask the location of the presentation (church, school, organization, etc.) and capture the name of the institution where presentation was given.</i></p> |
| Events | <ul style="list-style-type: none"> • Number of: <ul style="list-style-type: none"> • Events held • Participants at event • Individuals enrolled through this particular event (if applicable to you) • Materials distributed at the event |
| Partnership Development | <ul style="list-style-type: none"> • Number of: <ul style="list-style-type: none"> • Organizations helping you with your goal • Referrals made to organizations (keep track of the name of the institution) • Referrals received and by whom • Individuals enrolled through this particular strategy (if applicable to you) |
| Earned media efforts | <ul style="list-style-type: none"> • Number of: <ul style="list-style-type: none"> • Articles and stories (print and online) about your organization • Times staff participated in Radio and TV program • Calls received or other notable outcomes • Television stories that feature your outreach • Individuals enrolled through this particular strategy (if applicable to you) |

