**SETTING GOALS TO ADDRESS MEDICAID CHURN**

 Purpose

This tool is designed to help teams establish goal(s) for addressing Medicaid churn. As you begin to think about how to reduce churn in your agency, a helpful early step is to set goals. Establishing clear goals from the outset can help you to identify who needs to be involved, guide decision points throughout the design and implementation process, and provide a framework for determining how to assess the effectiveness of the changes that are enacted.

**Depending on your familiarity and comfort with writing goal statements, this tool will guide you through a progression similar to this:**

**Review the barriers and opportunities.**

**Brainstorm basic goals with your team.**

**Categorize, condense, and prioritize the goals.**

**Ensure the goals are SMART.**

 Instructions

This tool should be completed by the staff within the Medicaid agency responsible for the success of the Medicaid churn reduction initiative(s), including but not limited to the executive sponsor and project lead(s). Using the steps below you will work with your team to plan goals to address churn-related issues. The goals identified in this tool will be used to identify the additional internal state and local staff that will comprise the core Medicaid Churn Team. Additionally, the information gathered below can be used to further gain buy-in and a commitment of resources (e.g., staff time and funding). After the core team has been identified and engaged this tool should be revisited and updated, as needed.

Step 1: **Discuss**

*Spend a few minutes discussing with your colleagues the challenges, opportunities, and relevant ideas that you outlined in readiness assessment, or that you already know. You may also consider how reducing Medicaid churn aligns with broader state/agency priorities. Use the questions below to guide you and record any answers or ideas that may be helpful as you brainstorm goals.*

1. **Where are there gaps or opportunities?**

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1. **What would you like to see changed or improved?**

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1. **What is working well, that could be expanded to support churn-reduction activities or initiatives?​**

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1. **What current strategies are in place, and what is being missed?**

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1. **How can you use data to help you?**

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Step 2: **Brainstorm Basic Goals**

*Now think about what should be changed through a churn-reduction initiative. What are your goals for changing policies and practices that exacerbate churn? Try to create a large list and don’t worry about the details yet, your team with condense and edit them later.*

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| **Example Goal:** | Establish processes for verifying beneficiary contact information with payers to reduce the likelihood of returned mail |
| **Goal 1:** |       |
| **Goal 2:** |       |
| **Goal 3:** |       |
| **Goal 4:** |       |
| **Goal 5:** |       |
| **Goal 6:** |       |
| **Goal 7:** |       |
| **Goal 8:** |       |
| **Goal 9:** |       |
| **Goal 10:** |       |

Step 3: **Categorize Your Goals**

*Next you will identify redundancies and overlapping ideas by categorizing them. Copy the goals your team generated into the table below, and assign category names for each row. If you have goals that belong in the same category, group them together in the same section. Leave the revised goal column blank until you finish moving all of your goals into the table and assigning categories.*

***Now look at the goals in each category and ask:***

* *Can we combine, condense, or eliminate individual goals within categories so there is no redundancy?*

***In the last column, record, revise and combine similar ideas.*** *These are the goals that will be kept and used to shape the program. They will be needed in the last step. You can add columns and categories if needed. An example is provided for you.*

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| **Goal #** | **Goal** | **Category** | **Revised Goal** |
| Example | Establish processes for verifying beneficiary contact information with payers to reduce the likelihood of returned mail Increase the number of attempted mail delivery attempts before terminating enrollment | Beneficiary Outreach | Establish processes that improve the likelihood of successful beneficiary outreach & engagement during renewals/ recertifications. |
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Step 4: **Make Your Goals SMART**

*Now that you have a list of ideas, you may need to make some tweaks to ensure they are useful, actionable, and specific. A common formula for this type of goal setting is SMART formula. SMART goals are: Specific, Measurable, Attainable, Relevant, and Time-bound.*

***SPECIFIC*** *goals include the who, what, and where:*

* *Who must be involved for it to be successful?*
* *What objective needs to be accomplished?*
* *Where is this goal to be achieved?*

***MEASURABLE*** *goals have criteria that help you know if you are making progress:*

* *What steps will be taken to achieve it?*
* *What does progress look like?*
* *What metrics will be used to measure success?*

***ATTAINABL****E goals consider what you need in order to be successful by answering questions like:*

* *Do I have the resources needed to achieve this?*
* *Have others done something similar before?*

***RELEVANT*** *goals can realistically address a problem:*

* *How is this aligned with overall objectives?*
* *Is the goal reachable, given the time and resources?*

 ***TIME-BOUND*** *goals have a start and an end*

* *Does the goal have a deadline?*
* *How will I know when we have been successful?*

*Here is an example to help you:*

***Goal: I would like to be a better runner.***

*To make this SMART, you could add the following elements:*

* ***Specific:****I’m going to start running and train for a marathon.*
* ***Measurable:****I will run at least three miles a day, or a minimum or 20 miles a week.*
* ***Attainable:****I have done some running before, my body is reasonably healthy, and the marathon is 6 months from now.*
* ***Relevant:****I want to become a fit, healthy, and strong person — I want to be full of vitality, energy, and zest for life!*
* ***Time-bound:****I have signed up for a marathon 6 months from now.*

*Thinking about the example you just read, discuss with your team the following questions:*

* *What can you add to improve your goals?*
* *What needs to be more specific?*
* *Can you add ideas for measuring success?*

*Finally, utilize the table below to articulate your agency’s goals for addressing Medicaid churn. These goals should be revisited often to ensure your team is operating as intended and to allow opportunities for course correction as needed.*

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| **Medicaid Churn Reduction Goals** |
| 1: |       |
| 2: |       |
| 3: |       |



Next Steps

After the state and/or agency goals have been identified, you should seek to identity the core team of internal state and local Medicaid staff who will lead efforts to achieve the goals articulated. This tool should be revisited as needed to ensure the right staff are engaged. For assistance identifying and engaging internal state and local staff, please visit the [Building the Core Medicaid Team Tool](https://bdtrust.org/Build_Core_Churn_Team.docx) within this toolkit.

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*The views expressed here do not necessarily reflect the views of the Foundation.*