Outreach & Communications Strategy and Contract Extension

(VOTE)

The Health Connector Team

Board of Directors Meeting
June 13, 2013
It’s A Campaign

- Nationwide, outreach and communications efforts have hit the ground and are rapidly ramping up in preparation for 2014
  - The national focus is on raising awareness and getting people to sign up for insurance
  - Across states, significant activities in grassroots outreach, consumer assistance and media communications are being launched to promote the October open enrollment
  - Substantial federal resources committed to outreach
- In Massachusetts, our focus on communications is no less than any other state. We are faced with unique opportunities and challenges that make a successful outreach campaign a crucial priority......
As the state that has led the nation in health reform, Massachusetts benefits from a host of key advantages:

- High insurance rate, with real opportunities for further gain with the ACA
- Continued strong support for health reform from the Patrick Administration and the Legislature
- A market that is generally informed and favorable toward health reform
- An extensive network of experienced and committed community partners
- Robust data and information on key target market segments (existing members, research on remaining uninsured, etc.)
Advantages & Challenges (cont’d)

At the same time, we need a communications strategy that effectively addresses our unique challenges:

- The market does not yet widely appreciate the tremendous benefit/difference of the ACA on top of the MA reform
- Unlike in 2006, the required compliance is not just with “state rules” but the combination of federal and state rules, leaving many with questions and in need of help
- There is a long open enrollment period (residual state open enrollment in July-Aug followed by a 6-month federal open enrollment starting in October) that needs communications support
- The unique task of transitioning more than 250,000 Health Connector members to new coverage in a short period of time
  - Most will need to actively re-apply in order to maintain health insurance
  - Many will be moving programs, creating unprecedented risk of confusion absent proactive, exceptionally effective outreach
Strategic Levers

To maximize success, our communications strategy must be multi-faceted and heavily leverage cross-market coordination.

- Develop a set of **core messages** that will *consistently* drive the entire campaign.
- Pursue a portfolio of initiatives to reach a broad audience base through **multiple channels**.
- Train and engage community partners to conduct **grassroots outreach**.
- Seek opportunities to collaborate with **other states and the federal government**.

**Target Audience**

- General Public
- Other Market Participants/Stakeholders/Influencers
- Individuals & Businesses Able to Leverage Marketplace Opportunities
- Remaining Uninsured
- All Current Health Connector Members
Potential Key Messages

- The ACA keeps Massachusetts moving forward towards making high-quality health care affordable to all of its residents
  - Provides significantly enhanced federal resources to cover people already served by the Commonwealth’s health insurance programs
  - Makes it easier for many individuals and small employers to find and maintain affordable coverage
  - Empowers consumers by promoting transparency and innovation in health insurance
  - Supports the transition to care models that save money by providing better care
The Health Connector has been laying the groundwork of a series of outreach initiatives targeted for summer/fall 2013.

- Today’s presentation will discuss our progress to date on these work tracks, including specific operational details.

Health Connector initiatives are a component of the broader communications strategy around the Affordable Care Act.

- The ACA entails opportunities that go beyond those offered through the marketplace.
- The goal of the communications campaign is to engage not only Health Connector customers but also the broader market.

As such, a focal point of our communications effort is close coordination with state agencies, the stakeholder community and other market partners.

- Joint planning, consistent messaging, outreach partnership, etc.
Planning is currently underway for six areas of initiatives.

- **Guided by consistent messaging**
- **The initiatives are designed to overlap and closely coordinate**

- Direct Mail & E-mail
- Enrollment Assisters
- Outbound Calling Campaign
- Media Campaign
- “Road Shows”
- Public Education
We plan to launch a comprehensive Outbound Calling Campaign targeting more than 215,000 current and newly eligible Health Connector members transitioning to new coverage models available beginning in 2014.

- This campaign will target existing Health Connector enrollees, including Commonwealth Care, Commonwealth Choice and Business Express members
  - Will also target individuals transitioning from other programs (e.g., Insurance Partnership, MSP, HSN) and eligible but un-enrolled individuals
- Will run from October 1, 2013 through March 31, 2014, in line with the initial Federal Open Enrollment
  - All members (with the exception of some Business Express enrollees) must transition to their new coverage options during this time period or risk gaps in coverage until the next open enrollment
- Goals:
  - Generate awareness
  - Supplement other outreach efforts
  - Effectuate enrollments whenever possible
The Outbound Calling Campaign will leverage our new customer service vendor to provide a “high touch” option to help get members enrolled.

Key Features:

- Auto-dialing robo-calls during extended hours of operation (nights/weekends)
- Live help & assistance with application and enrollment process
- Call recording & live reporting to track transition progress and target remaining unenrolled
- Adaptability to adjust or modify campaign strategy for maximum effectiveness

Phase 1
CommCare, YAP, BE & Non-Group with 12/31 coverage end dates

Phase 2
CMSP, MSP, IP & Remaining un-enrolled from Phase 1

Phase 3
BE & Non-Group with 3/31 coverage end dates & remaining un-enrolled from Phases 1 & 2

Phase 4
HSN, CommCare eligible but un-enrolled remaining un-enrolled from Phases 1, 2 & 3
We are also in the midst of a current and prospective member e-mail campaign designed to complement and supplement our outbound mailing strategy.

- **E-Mail collection efforts (ongoing)**
  - Launched originally for Commonwealth Choice members not eligible to purchase outside of open enrollment; expanded to include Commonwealth Care members starting in May 2013
  - Will allow for e-mail notifications and reminders to individuals and small businesses about new coverage options available as part of the ACA and the need to re-enroll for current members

- **Direct mail strategy (August 2013-March 2014)**
  - Leverages current 1.0 notices to include important messages about transitions and new benefits and programs
  - New mailings will include postcards, inserts, open enrollment packets highlighting new plan options and a “Return to Us” letter

- All messages will be developed by staff, reviewed by external parties whenever possible (e.g., MassHealth, consumer advocates, etc.) and finalized by our member communications vendor, Maximus Center for Health Literacy
We will be partnering with Brokers, Certified Application Counselors, Navigators and other key partners to conduct outreach and education on our behalf as they enroll individuals and small businesses in our programs.

- **Brokers**
  - We will be training Brokers generally on the ACA (continued CE courses, BAC workgroups and meetings, e-mail blasts and helpful collateral) and working closely with Brokers in the design of the Navigator program training to ensure close collaboration between these teams.

- **Navigators**
  - Grant recipients will be trained by the Health Connector and required to conduct health fairs and other outreach events to generate interest in and knowledge of Health Connector programs, along with directly assisting applicants with enrollment.

- **Certified Application Counselors**
  - The Health Connector is working with EOHHS to ensure that current Virtual Gateway users are trained on important changes under the ACA and are able to help individuals apply for coverage at the point-of-service.
Our training of these key partners, as well as our Customer Service & Business Operations vendor, has already begun and will accelerate later this summer with the launch of the HIX-IES system.

- **Ongoing training efforts**
  - In partnership with MassHealth, we have been educating providers and consumer advocates on the new programs and benefits that will be available starting in 2014 through quarterly Massachusetts Training Forum sessions held both in-person and via conference call (inclusive of the ACA learning series) and ACA stakeholder meetings

- **Upcoming training efforts**
  - External reviewers will participate in fine-tuning training materials for different audiences (e.g., MassHealth, Broker Advisory Council, etc.)
  - Training will be delivered through instructor-led classroom sessions, eLearning web-based modules, community presentations and train-the-trainer sessions

- **State & Federal collaboration efforts on training**
  - In recognition of overlapping training needs throughout the country, the federal government is sharing its training materials and call center scripts
  - To further streamline efforts, the Health Connector is partnering with other New England State-Based Marketplaces to develop and share training materials
We are planning a series of “town hall” style public events to engage employers and brokers.

- Build upon the foundation of employer engagement to date
- 5-7 events in September, covering various regions
- Targeting employers of all sizes and industry sectors to help promote broad understanding of the ACA and its impact
- Examples of key topics:
  - Reconciling MA health reform and ACA – “what will stay and what will go?”
  - Employer opportunities and responsibilities
  - Changes in the subsidized coverage landscape
- Seeking partnership opportunities with business associations to host the events

**Health Connector Employer Outreach Efforts To Date**

- We launched an employer engagement series in early 2013
  - Met with 14 associations since January
  - Focused on introducing ACA impact and the new opportunities and benefits available to employers as a result
  - Highly positive feedback on our outreach and there is a clear “hunger” for more information and dialogue
- We are also in the process of convening an Employer Advisory Council
Similarly, we are also planning community outreach events to target individuals and families.

- A series of “community fairs” in the summer
  - Seeking opportunities to collaborate with community organizations
- Prioritize cities and towns with high concentration of uninsured and low-income population
  - Potentially also target colleges and universities to engage new graduates (a notable cluster of uninsured)
- Likely topics:
  - Highlight new opportunities brought by the ACA
    - Expanded eligibility for subsidies
    - New and improved experience obtaining coverage through the Health Connector
  - “Call to action”: need to act to obtain or retain coverage
  - Introduce Navigators and other consumer assistance programs
We plan to launch a “Public Information Unit” to manage general education and inquiries related to the ACA and the Health Connector.

- The “PIU” was a critical function during the 2006 launch. The effort was gradually reduced but continues to be an important function of Health Connector 1.0.

- Our vision is to re-establish a centralized unit (2-3 staff members) for managing inquiries received from the public, legislature, other state offices, and federal agencies.
  - Addresses phone and e-mail inquiries and handles legislative/constituent issues.
  - Collaborates closely with Customer Service and Consumer Assistance Hotline (managed by Health Care for All and partially funded through Establishment Grant dollars).

- Proactively identifies and highlights recurring issues, themes and opportunities and informs other outreach activities (e.g., road shows, training for Navigators and brokers, etc.).

- Targeting launch in late July–early August.
We will be distributing a portfolio of collateral materials (brochures, handbooks) to provide information and tools.

- Leveraging Health Connector strength in policy and education, seek to address market needs for knowledge, including step-by-step guide to compliance with both ACA and MA law
- Provide detailed but easy-to-understand explanation of rules and options (e.g., real life scenarios)
- Collecting content inputs from a host of external advisors (select board members, stakeholders, brokers, etc.)
- Targeting staggered release starting in July (distributed at public events as well as on website)
We plan to “soft launch” our rebranding campaign with the state open enrollment in July-Aug, and transition into the Health Connector 2.0 campaign in the fall/winter.

- The state non-group open enrollment (applies to Commonwealth Choice) is an important window to seize market attention and bring people into the door
  - TV, radio, digital, print
  - Supported by a “pre-launch” of 2.0 website with new design and ACA-related collateral materials
  - Coordinates with a national backdrop of ACA communications
- ...Followed by a larger campaign on Health Connector 2.0 that starts in September
  - Showcasing MA success; “We are getting even better”
  - Leveraging national sponsorship opportunities in partnership with other states and the federal government

### Summer OE Campaign Theme
- Real people, Real stories (featuring member testimonials)
- Easy. Affordable.
- Available right now
- Find out more about changes coming in the fall
The paid media campaign will be complemented by earned media and social media presence.

- Create awareness of new ACA benefits and demonstrate Massachusetts' leadership
  - In collaboration with state officials and other key partners, engage the media to talk about reform health success and exciting new changes on the horizon
- Leverage social media to aggressively communicate about who we are and what we have to offer to Massachusetts residents and businesses
  - Social media is flexible, inexpensive and increasingly impactful with a growing segment of the market
  - Actively maintain our Facebook page
  - Establish regular Twitter presence
  - Launch a Google+ identity
  - E-mail and text blast campaign
To support many of the previously mentioned communications efforts, we need the assistance of a trusted partner to successfully deliver on our outreach goals.

- Our current vendor, Weber Shandwick, has supported the Health Connector since our inception and appreciates the unique challenges that we face during this transition period.

- They led our partnership with the Boston Red Sox in 2007, supported us in educating and promoting the statewide open enrollment period that began in 2011, and helped us re-launch Business Express in 2012.

- Weber Shandwick is also closely familiar with national outreach campaign strategies and is capable of crafting the “Massachusetts Message” in a way that complements efforts in neighboring states.
Public Education, Outreach & Advertising Contract Extension (cont’d)

• We re-procured Weber Shandwick last January for a contract running from January 1, 2012 through June 30, 2013, with the option for three one-year renewals.

• We propose exercising the option to extend the contract for one additional year from July 1, 2013 to June 30, 2014 at the same rate of $190 per hour that we have had with Weber Shandwick since our first contract in 2007.

• Under this contract extension, Weber Shandwick would perform a host of activities to continue their support of the Health Connector as we transition to Health Connector 2.0:
  - Market research and message testing
  - Media placement of TV commercials, radio advertisements, internet banners, etc.
  - Rebranding launch
  - Social media campaign
  - Promotional corporate or celebrity partnerships & sponsorships

• Spending under this contract will be exclusively funded by federal grant dollars and is budgeted not to exceed ~$7M (encompassing media placement and other public outreach and education efforts).
At this time, we recommend that the Board authorize the Health Connector to renew its contract with Weber Shandwick for an additional term beginning July 1, 2013 through June 30, 2014.
# High-Level Timeline

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