

# New York Health Benefit Exchange

## Blueprint Summary for Section 2.0 Consumer and Stakeholder Engagement and Support October 26, 2012

<u>Item Number</u>	<u>Topic</u>
Section 2.3	Education and Outreach

The goal of the New York Health Benefit Exchange Marketing, Education and Outreach Plan is to connect New Yorkers with quality, affordable health insurance through an easy-to-use, trusted source that allows them to compare and purchase plans.

In order to meet this ambitious goal, New York is developing a multi-faceted outreach campaign that creates multiple touch points to reach our target audiences. The plan includes 4 phases: (1) Positioning; (2) Pre-launch Planning; (3) Launch; and (4) Post-launch and Maintenance.

New York Health Benefit Exchange will:

- Extend our reach through navigators, consumer advocates, Regional Advisory Committee members and other stakeholders who have direct inroads with our target audiences.
- Target populations most likely to enroll to demonstrate early successes and build momentum.
- Plan concentrated communication waves with coordinated activities to help amplify our efforts.
- Build early public support for the Exchange to help encourage enrollment and sustain the Exchange.
- Reach low-income, diverse and vulnerable populations through targeted outreach.
- Develop a multi-pronged education campaign designed to effectively utilize the existing infrastructure (and supplement where needed) of community-based organizations (CBOs) and community advocates to connect individuals with coverage through the Exchange.
- Build a small business owners' engagement plan that builds upon the trusted distribution system of producers and Chambers of Commerce and includes tailored touch points and messages that align with the rest of the campaign.

The NYSDOH will work with an established advertising agency to develop an identity and communications framework. The agency will research the target audience and test the identity components with them to make sure the Exchange is understood and appeals to all eligible audiences.

Activities include:

- Audience segmentation
- Ethnographies
- Message development and audience testing
- Branding/positioning focus groups with target audience

In addition, New York will conduct three advertising campaigns. The campaigns will be developed by an experienced advertising and marketing firm with consultation from the Department's Bureau of Marketing and Creative Communications. The first wave of advertising will occur during the summer of 2013 (Phase 3: Launch) to raise consumer awareness leading up to Fall 2013 open enrollment, followed by additional advertising waves in the Fall and

Winter 2013-14 open enrollment period. We will require regular status updates from the consultants, working sessions to review and refine marketing messages and media flight schedules.

### **SHOP Education and Outreach**

The above plan describes efforts to directly incorporate SHOP stakeholders (e.g., agents, brokers, employers, employees, Chambers of Commerce) into the New York Health Benefit Exchange. In addition to our overall education and outreach campaign, a small business owners' engagement plan with tailored touch points and messages will be created to address the specific needs of the SHOP Exchange audience.

Small business, producers and related associations have broad representation among New York's Stakeholder audience. We will continue to work directly with these groups to provide education, training and guidance on licensure requirements. Education campaigns directly aimed at small business owners will also build upon this trusted distribution system in New York.

## Target Audiences

Primary audiences:

- Consumers
  - Low-income
  - 138 – 400% FPL (parents of kids on CHIP)
  - Childless adults, age 18-64, enrolled in individual markets
  - Sole Proprietors
- Small Business Owners
  - 2-50 employees (currently)
    - For-profit
    - Non-profit
  - 51-100 employees (for 2016)

Secondary audiences:

- Policymakers
- Stakeholders

## Phase 1: Positioning

### **Brand, Message Development and Research**

Develop and test name, brand positioning and message framework

- Develop brand and message
  - Develop brand positioning and logo
  - Develop message framework
- Conduct research
  - Audience segmentation survey
    - Test
      - Demographic/behavior/values/attitudes
      - Message themes
      - Motivations/barriers
      - Initial names/brand concepts
  - Focus Groups
    - Test
      - Motivations/barriers
      - Tailored messages
      - Name, logo, look and feel
      - Audiences
        - 200 – 400% FPL
        - 400% FPL +
        - Small business owners (for-profit and non-profit) with 2-50 employees
- Finalize brand and message
  - Brand
    - Develop style guide
    - Create brand templates
  - Message
    - Develop core message document
    - Craft talking points for key agency staff and stakeholders
    - Create template message materials for key agency staff and stakeholders

- Conduct message training for key agency staff

## Phase 2: Pre-Launch Planning

### Stakeholder Engagement

- Reengage stakeholders
  - Hold one-on-one conversations during session
  - Create stakeholder plan
    - Conduct regular meetings of the Regional Advisory Committees
    - Provide semi-monthly communications on key developments to the Exchange
    - Outline possible workgroups, roles and responsibilities
    - Determine key stakeholders to engage with, such as:
      - State agencies
      - Providers
      - Hospitals
      - Insurers
      - Navigators, agents and producers
      - Health care advocates
      - For-profit and non-profit small businesses

### Partnerships and Community Engagement

Initiate and develop relationships with current and new community and business partners that serve the Exchange's eligible populations.

- Develop agency, community and corporate partnerships
  - Determine which partners are already engaged with our target audience
  - Develop a list of potential partners and contacts
  - Assign a staff person to each organization/contact
  - Develop partnership outreach materials, including PowerPoints, talking points and specific asks of organizations
  - Reach out and begin to develop
- Partnerships include but are not limited to:
  - State and County Agencies
    - Department of Health programs that serve target audiences
    - Office for the Aging, Empire State Development, Office of Temporary and Disability Assistance, Department of Motor Vehicles, etc.
    - Counties/local government
    - Tribes
  - Community Partnerships
    - Community organizations/advocates
    - Faith-based community
    - Hospitals and health systems
      - Regional examples: Glen Falls Hospital; Continuum Health Partners; NYU Langone Medical Center; Presbyterian Hospital
    - Health Care Associations
      - Regional examples: Healthcare Association of NYS (HANYS), Iroquois Health Care
  - Business partnerships
    - Business and labor associations
    - Non-profit business organizations
    - Large employers

- Retailers
  - Wal-Mart; Kroger; K-mart; Hannaford; Kings; Stop and Shop; Wegmans; Price Chopper; ALDI; Price Rite
  - Home Depot; Lowe's
  - Duane Reade; CVS; Walgreens; Rite Aid
- Sports Teams
  - Jets; Giants; Islanders; Rangers; Yankees; Mets; Bills; Sabres; Bisons; Knicks; Liberty; Nets; Division 1 schools, regional schools of interest (i.e. Siena, UAlbany, UB)
- Cell phone companies
  - Verizon; AT&T; Sprint; T-Mobile
- Entertainment and Tourism
  - Bronx Zoo
  - New York State Fair; county fairs
  - Festivals and other appropriate community events
- Media
  - NBC; New York Times; Viacom; ABC; CBS
- Transportation
  - Subway, buses, Metro North
- Cable Providers
  - Time Warner, Cablevision, FiOS

### **Materials Development**

- Develop presentation materials
  - Develop a template PowerPoint for stakeholders and agency staff to use at meetings, public forums, community events, etc.
  - Create template listservs to update interested parties on the Exchange and key developments
- Develop educational materials for stakeholders and partners
  - Determine which materials are needed and most useful through conversations with stakeholders and consumer research. Materials may include, but are not limited to:
    - Brochures
    - Posters
    - Palm cards
    - Magnets

### **Earned Media**

- Conduct a landscape analysis of all Exchange-related media coverage in New York
- Create a detailed media list, segmented by media market
- Assess the natural media opportunities that the Exchange can take advantage of and develop a list of creative ideas that can augment them, such as:
  - Reports
  - Spokesperson appearances
  - Event-driven stories
- Develop an editorial calendar with specific dates and targeted approaches, including:
  - Op-eds
  - Editorial board meetings
- Develop a speakers bureau of people that can help tell our story
- Collect personal stories of people benefitting from the Exchange(3months or more into 2014)
- Conduct media trainings with key spokespeople
- Secure targeted placements post open-enrollment to support rolling/monthly enrollment for SHOP Exchange

## Digital

- Launch new informational website Fall 2012. Develop promotional plan for Consumer Exchange site that goes live October 2013. Plan will address the following:
  - Let residents know the Exchange is coming
  - Answer questions
  - Promote community awareness activities
  - Start collecting email addresses

## **Phase 3: Launch**

### Continue Partnerships, Community Events, Digital Engagement, etc.

#### Advertising

- Develop paid advertising
  - Develop statewide media plan
  - Develop advertising creative
    - Potential mediums
      - TV
      - Online
      - Radio
      - Mobile
      - Print
      - Outdoor
      - Partner packages
      - Long-lead publications
        - 4-6 month lead time
  - Initial Waves
    - Flight 1: Summer 2013 (July - September 2013) (build awareness)
    - Flight 2: Fall 2013 (October – December 2013) (drive enrollment)
    - Flight 3: Winter 2014 (January - March 2014)(drive enrollment)
    - Ongoing marketing/advertising to support rolling/monthly enrollment opportunities for SHOP

#### Digital Social Media

- Develop and implement social media engagement plan (Fall 2013)
  - Seed the conversation online
  - Engage with primary influencers/opinion leaders
  - Drive potential enrollees to Exchange
  - Explore and determine mediums
    - Twitter
    - Facebook
    - YouTube
    - LinkedIn (small businesses)
    - WebMD

## Phase 4: Post-Launch and Maintenance

### Evaluation

- Develop evaluation metrics and data collection and reporting process (August 2013)
- Track progress against metrics (examples include):
  - Enrollment metrics
    - # of residents with health insurance
    - # of consumers who enrolled by X date
    - # of consumers enrolled by county
    - # of small businesses providing insurance – pre and post
  - Awareness metrics
    - Public support for Exchange – pre and post
    - Demographics of those not enrolled
  - Reach metrics
    - # of partnerships
    - # of website visits
    - # of advertising and earned media impressions
    - # of community events
    - # of materials distributed
    - # of calls to hotline
  - Methods
    - Benchmark survey and post-survey after second media flight
    - Google analytics
    - Media buyer reporting
    - Internal reporting
    - Navigator/agents and stakeholder reporting