

# New York Health Benefit Exchange

## Detailed Design Review Summary for Section 2.0 Consumer and Stakeholder Engagement and Support October 9-10, 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.

New York is developing a Plan that will consist of a total of 4 phases. These Phases include (1) Positioning; (2) Pre-launch Planning; (3) Launch; and (4) Post launch and Maintenance. In order to meet this ambitious goal, New York plans to:

- Create a multi-faceted outreach campaign that creates multiple touch points that reach our target audiences.
- 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 with tailored touch points and messages that align with the rest of the campaign.

New York's June 2012 Level One Establishment grant funding will allow for the development and testing, naming, brand positioning and messaging framework for the Exchange as well as the following pre-launch (Phase 1: Positioning and Phase 2: Pre-launch Planning) research:

- Audience segmentation
- Ethnographies
- Message focus group
- Branding/positioning focus groups

In addition, New York will conduct two advertising campaigns with the help of a professional firm, HN Media, during the summer of 2013 (Phase 3: Launch) to raise consumer awareness leading up to Fall 2013 open enrollment. (We plan to launch additional advertising waves in Fall and Winter 2012-13 with supplemental grant support.) 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 plan described above describes efforts to directly incorporate SHOP stakeholders (agents, brokers, employers, employees, chambers of commerce, etc.) 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.

## Target Audiences

Primary audiences:

- Consumers
  - Low-income
  - 138 – 400% FPL (parents of kids on CHIP)
  - Childless adults enrolled in individual markets
- Small Business Owners
  - 50 – 100 employees

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
    - 800 person sample
  - Focus Groups
    - Test
      - Tailored messages
      - Name, logo, look and feel
      - Audiences
        - 200 – 400% FPL
        - 400% FPL +
        - Small business owners 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
    - 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
      - Business

### Partnerships and Community Engagement

- Develop agency, community and corporate partnerships
  - Determine which partners are already engaged with your 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
- Potential partnerships
  - State and County Agencies
    - 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
      - Glen Falls Hospital; Continuum Health Partners; NYU Langone Medical Center; Presbyterian Hospital
    - Colleges and universities
      - NYU; State University of New York; City University of New York; Touro College; Stony Brook University; Columbia University; Syracuse University; Cornell University
  - Business partnerships
    - Business and labor associations
    - Large employers
    - Retailers
      - Wal-Mart; Kroger; K-mart; Hannaford; Kings; Stop and Shop; Wegman's; Price Chopper

- Home Depot; Lowe's
- Duane Reade; CVS; Walgreens; Rite Aid
- Sports Teams
  - Jets; Giants; Islanders; Rangers; Yankees; Mets; Buffalo Bills; Sabres; Bisons; Knicks; Liberty
- Cell phone companies
  - Verizon; AT&T; Sprint; T-Mobile
- Entertainment and Tourism
  - Bronx Zoo
  - New York State Fair; county fairs
  - Festivals (Falcon Ridge Folk Festival, Nyack's Famous Street Fair, Oyster Festival)
- Media
  - NBC; New York Times; Viacom; ABC; CBS
- Transportation
  - Subway, buses, Metro North
- Utility Companies

### **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 collateral materials for stakeholders and partners
  - Determine which materials are needed and most useful through conversations with stakeholders and consumer research. Materials may include:
    - Brochure
    - Posters
    - Palm card
    - 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
  - Spokespeople 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 your story
- Collect success stories of people benefitting from the Exchange
- Conduct media trainings with your key spokespeople

## **Digital**

- Assess current site and determine if an interim consumer website is needed or a splash landing page
  - Let residents know the Exchange is coming
  - Answer questions
  - Promote community activities
  - Start collecting email addresses
- Begin social media engagement
  - 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 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 (build awareness)
    - Flight 2: Fall 2013 (drive enrollment)
    - Flight 3: Winter 2014 (drive enrollment)

### Evaluation

- Track progress against metrics:
  - 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 HIX – 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
  - Methods
    - Benchmark survey and post survey after second media flight
    - Google analytics
    - Internal reporting
    - Navigator/agents and stakeholder reporting