Attachment 2a
December 8, 2011

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Oregon Educators Benefit Board

Long-term Communication Plan: Analysis, Goals and Action Planning

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I. Purpose of the of the Long-term Communications Plan

The Oregon Educators Benefit Board (OEBB) developed the plan to meet and address the Board's long-term communications needs, and guide the OEBB as changes occur in the membership and the marketplace over time.

The Communications Plan will serve as a guidepost for establishing relationships with educational entity leadership, OEBB benefit plan participants, union leadership, benefit plans carriers and other entities; and, the plan will serve as the roadmap for the primary communication conduit between the Board and its members, its stakeholders and its interested parties outside the OEBB network.

The Plan identifies communication priorities of the Board, sets OEBB communication goals, establishes the factors for measuring the success of OEBB communications, and establishes the protocols for responding to the needs of those it serves.

Transparency of the plan will help foster public trust and accountability of the Board, its staff and program for members and stakeholders of OEBB.

II. Situation Analysis

Prior to the creation of the OEBB Long-term Communications Plan, the Board had no strategy for communication due in part because of the age of OEBB (being created in March 2007 through the enacting of Senate Bill 427.)

In September 2007 a Short-term Communication Plan was created and adopted by the Board that addressed the immediate needs of OEBB including the maintenance and expansion of the website, the creation of the newsletter, *The Benefits Bulletin*, and developing a longer-term communications strategy.

The website is filled with information and is updated when new information becomes available. It is the first line of communication between the Board and all other parties seeking information about OEBB. A stationary, permanent source of information, the creation of the website has enabled the Board to be in constant communication with interested parties.

As of October 2007, the site was home to information including Board member's bios, Guiding Principles, Frequently Asked Questions, Newsletters, Timeline of Action, History and meeting updates.

The site continued to expand as the Board made decisions, plans were designed and sent to bid and eventually offered, and the Board aged.

In 2010, the website was restructured to make information more accessible to OEBB's varying audiences. This included the creation of two microsites embedded within the main OEBB website – one specifically targeted to OEBB's participating educational entities and benefits administration staff, the other focused on providing health care information and helping OEBB members become better-educated consumers of healthcare and increasing member engagement in their healthcare experience.

The newsletter has been an effective vehicle for getting information to interested parties and driving people to the website. Named *The Benefits Bulletin*, the newsletter is typically four pages containing timely information on current and upcoming OEBB events and initiatives, articles pertinent to our population's health concerns , OEBB and carrier contact information, wellness program information, health care tips and success stories.

The document received a make-over in June 2010, improving its visual appeal with a more colorful and modern design. OEBB's annual member survey and individual reader feedback indicate the newsletter has been generally well-received. In 2011, OEBB staff reduced the publication frequency from monthly to quarterly, hoping to strike a balance where OEBB members receive information they need and appreciate without being overwhelmed by too many messages. OEBB publishes *The Benefits Bulletin* as an electronic pdf document which can be downloaded and printed if desired and e-mails the link to the OEBB Members listserv, as well as publishing the content on the OEBB website in searchable html format.

The Listserve is a method of sending e-mails to targeted groups providing immediate contact with interested parties, members and entity leaders. One of the positive aspects of the Listserv is that information prepared by OEBB can reach large numbers of people almost immediately. This is especially helpful when important benefit information is time-sensitive, or we need to target a message to a particular demographic of our population. It is also a cost-effective method of communication, eliminating printing and postage costs. These listservs are structured so recipients of OEBB messages can reply and reach OEBB staff without the entire group seeing their response. One of the downsides to this method of communication is that the high number of recipients can cause the messages to be interpreted as "spam"and blocked by pre-set filters without actually reaching the intended recipients.

The Outreach Network was established in February 2008. The Charter and application materials were drafted and members recruited. The network was designed as a way for entity employees, primarily, to become educated and informed about OEBB using the information provided by the OEBB staff.

The intention was that OEBB would provide the messaging, but the message would be delivered by trusted sources with a ground-level understanding of the mood, interpretations and feelings of those who would be affected by the OEBB benefit plans. The practical application of this concept proved to be more difficult than expected and The Outreach Network never fully materialized.

The Benefits Information Exchange (BIE) Group was formed in 2011 as a means of re-connecting OEBB staff with the educational entities we serve. In conjunction, **the BIE Steering Committee**, consisting of volunteers representing the full range of educational entities and regions OEBB serves, was formed to help develop the BIE Group agenda. These groups each meet monthly (via conference call, streaming video, e-mail and in-person attendance) to discuss current and upcoming issues, engaging the entity benefit staff in the decision-making process as well as providing clear and timely communication as decisions are made. Although these groups were just recently developed, the meetings have been very well-received by the entities who have participated and we expect enthusiasm to grow and continue.

III. Goals

Communication goals and deadlines of OEBB include:

- Express commitment to deliver a quality benefits program that affordably meets member needs, **(Always)**

- Establish identity and brand with unique packaging, marketing and blanketing of information to members, entities, unions and interested parties, **(Always)**

- Generate confidence that the OEBB is managing the trend of rising healthcare costs now and in the future, **(Always)**

- Clearly communicate Board's intentions, meeting schedules, agendas, minutes and all other activities of OEBB, **(Always)**

- Prepare Board messages for use by the public, members, entities, union leadership and interested parties, **(Always)**

- Encourage constructive dialogue; prepare influencers and leaders to engage and educate members through the use of Talking Points and other similar communications vehicles, **(November 2007 and after)**

- Explain plan changes to benefit plans and the rationale for those changes with integrity and transparency, **(November 2007 and after)**

- Determine which communication vehicles are most successful, such as the website or newsletter, and use them to communicate regular messages to members, **(January 2008 and after)**

- Equip members and their families with the knowledge to make good benefits decisions -- at enrollment and throughout the year, **(August 2008 and after)**

- Educate members about how their actions impact the cost of health care -- for themselves and Oregon, **(August 2008 and after)**

- Communicate the attractiveness and balance within the OEBB benefits portfolio and its competitiveness, **(October 2008 and after)**

- Motivate members to actively participate in their own health improvement, **(October 2008 and after)**

- Focus messages on educating members about their benefits and managing their health, **(October 2008 and after)** and

- Tailor messaging to distinct audiences -- members and their dependent families at various life stages, career stages, financial status, health conditions, and levels of confidence, **(October 2008 and after)**

IV. Vision and Measures of Success

The OEBB's Vision of Success and Measures of Success in Communications include:

- OEBB sustains quality benefits and contains cost over the long term;
- The benefit strategy is competitive and attractive to entity employees;
- Members accept plan changes as fair and reasonable;
- Members gain insight about how their actions impact the cost of health care;
- Members begin to make wise decisions regarding wellness programs and enrollment;
- Members and interested parties are prepared to advocate for change;
- OEBB is recognized as an organization that delivers value and exceeds expectations;

- Entity sign up for the program before they are required to do so;
- Members report they have the proper tool and information to make good decisions regarding enrollments and wellness programs;
- The majority of members participate in a health assessment in the first year plans are offered;
- Claims analysis correlates with reduction in health risk indicators after full program implementation; and
- Cost increase trend bends downward and downward trend is sustained long term.

V. Target Audiences

Audiences targeted by the OEBB include, but may not be limited to:

Educational Entities/Unions

- 235 entities including school districts, educational service districts, community colleges, charter schools and HB2557-eligible individuals, OSBA, OEA, OSEA, COSA, among others,

  Vehicles:
  OEBB website
  Newsletter
  Toolkit
  Listserve
  Face-to-face meetings
  Conferences

OEBB members

- Over 147,000 lives including educational entity employees, early retirees, COBRA enrollees and their family members

  Vehicles:
  OEBB website
  E-mails
  Listserve
  Direct mailing, brochures, flyers, booklets
  Board meetings, and training sessions held throughout state

Public

- The citizens of Oregon

Vehicles:
OEBB website
Listserve
Board meetings, both traveling and in Salem

VI. Positioning

It is the position of OEBB to provide high-quality health, dental and other benefit plans for eligible employees at a cost affordable to the entities, the employees and the taxpayers of Oregon.

OEBB will work collaboratively with entities, members, carriers and providers to offer value-added benefit plans that support improvement in members' health status, hold carriers and providers accountable for outcomes, and provide affordable benefits and services.

VII. Key Messages

Key messages OEBB will communicate are in line with the Board's Guiding Principles as outlined:

- OEBB will provide value-added plans that provide high-quality care and services at an affordable cost to members;
- OEBB will collaborate with entities, members, carriers and providers that ensure a synergistic approach to the design and delivery of benefit plans and services;
- OEBB will support improvement in members' health status through a variety of measurable programs and services such as consumer education, disease management and wellness programs;
- OEBB will create and define measurable goals and programs that hold carriers and providers accountable for health outcomes; and
- OEBB will encourage members to take responsibility for their own healthcare needs and outcomes.

VIII. Strategies and Tactics

Communication strategies of OEBB include several facets, parties and vehicles. Strategies include communicating with members and interested parties, push-pull communications with members and interested parties, receiving communication from members and interested parties, exchanging ideas, policy and information with members and interested parties, OEBB's communication responsibilities toward members and interested parties and it outlines the policy of naming OEBB's appointed spokesperson.

Additionally, it is vitally important for the Board and staff to understand the change and process for all interested groups stakeholder groups and continue to develop program plans, roadmaps and measures for communicating messages pertaining to these issues as they arise and change continues through Board decisions and membership, and continue to plan, prioritize and determine timelines for projects and activities required to accomplish change.

OEBB needs to continuously examine alignment of policies and programs and determine which of those support or inhibit OEBB's communications while keeping key leaders, influencers and interested parties informed and involved.

Communicating with members and interested parties

Promote member involvement by maintaining communication network with members, stakeholders and interested parties through e-mails, mailings, website, newsletter, Listserve and other means as deemed appropriate.

Act as a liaison between the Board, members and interested parties, distribute information, keep website updated, answer questions, address concerns and act as an Ombudsman for members.

Maintain a database registry of members and interested parties who have expertise in OEBB, either through their personal or professional interests. Use the registry as a point of contact for OEBB messages and to update stakeholders of changes and decisions of the Board.

Develop and maintain an active communication network with school boards, parent-teacher associations, booster clubs, union leadership and neighborhood and community groups to help pass along OEBB information, news and events. Use the contacts to address concerns and continually promote the message of OEBB.

Managing outgoing communications

Research and exploit the most effective ways of communicating with members and interested parties. Use methods such as mailings (enclose brochures, newsletters and

memos in routine mailings made by schools districts and unions), e-mails, website, newsletter and posted notices including flyers, brochures and calendars in plain language.

Produce summaries, or Talking Points, of all important documents and decisions of the Board that would otherwise be too complex or cumbersome to understand. Write a brief, or "backgrounder," to explain the reasons behind Board decisions.

If the question "why" arises, answer it early and concisely. Produce flyers, brochures, website messages and Listserve messages that describe processes, procedures and plans developed by the Board.

Prepare and distribute a list of important developments and issues facing the Board and make it available to members and interested parties before the decision is reached. Produce fact sheets and flyers about important issues, provide information to entities and interested parties and arrange for policies, plans and other hard-copy documents to be available in schools and update those documents as needed.

Prepare and distribute an annual report that describes the main planning activities and issues addressed by the Board during the last year.

Use the newsletter as a tool to provide off-line information to members and interested parties. Contact other agency's newsletter editors to suggest stories about OEBB or arrange to submit OEBB stories. Distribute newsletter to members and interested parties with content that contains short info snacks, factoids and health and fitness information, monthly themes, plan explanations, Board decisions and Board highlights.

Receiving communication from members and interested parties

OEBB will make it a priority to invite members and interested parties to the public Board meetings to solicit feedback, and widely publicize those meetings using the website, newsletter, and Listserves.

OEBB will develop a survey to send to members to solicit their feedback and seek ways to improve programs and policies.

OEBB's communication responsibilities to members and interested parties

OEBB will make it a priority to ensure members understand the reason for making changes and the implications of those changes to the healthcare plans they will enroll in. Part of this priority includes OEBB becoming the member's advocate in healthcare, emphasizing the need for the healthcare system to change – making the process more effective and efficient – and ensuring that interested parties and union leadership

understand the importance and the potential of OEBB and its benefit plan offerings to members.

OEBB will make it a priority to ensure interested parties that OEBB is taking a new role in administering healthcare and how it will affect their constituents, and will work to gain the support of members, interested parties and union leadership to support OEBB and not undercut the effort.

OEBB will communicate to members and interested parties that the Board has heard any concerns of members, entities and interested parties and has addressed them.

OEBB will develop relationships with union leadership and entity administrators to assist them in answering questions about OEBB.

The OEBB Communications Spokesperson

As decided by the Board, the OEBB Chair or appointed staff – typically the Administrator or Deputy Administrator -- will serve as the official spokesperson for OEBB.

Should a board member speak to the media on OEBB's behalf, that person should make one or all of the aforementioned people aware of their comments, who they spoke with and the name of the publication or media outlet.

IX. Collateral Materials

OEBB's Communication collateral materials have been produced as part of the Short-term Communications Plan, yet there are still documents that will be produced as needed. Current documents include frequently asked questions, history, guiding principles and timelines of action, among others and those yet to be created.

X. Direct Marketing Plan

OEBB may choose to communicate with members via direct marketing, though some of these strategies will have to be developed after the Administrative model is created. Hard copies of enrollment booklets, and other information may need to be delivered to schools or directly to the homes of members entering the plan.