

LFO Analysis

Department of Consumer and Business Services

Oregon Health Insurance Marketplace Publicity and Publication Plan and Report

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Request: Acknowledge the receipt of the publicity and publication plan and report for the Oregon Health Insurance Marketplace as requested by budget note.

Recommendation: The Legislative Fiscal Office recommends acknowledging receipt of the report and requiring that the agency submit a follow-up report to the Emergency Board on the full review of the 2016 open enrollment plan year campaign and the agency's plan for 2017 open enrollment plan year campaign, including base-line metrics for the campaign goals, during the September 2016 Legislative Days.

Analysis: The legislatively approved budget for the Marketplace includes Other Funds expenditure limitation of \$2,307,672 for marketing, publicity, or promotion during the biennium. In order to establish a base line of data on the efficacy and appropriateness of the expenditures directly related to enrollment, the legislature included the following budget note with the agency's budget

"The budget for the Department of Consumer and Business services includes funding for marketing and outreach efforts. DCBS is instructed to complete a plan and report on each of the publicity and publication campaigns either upcoming or implemented for the Health Insurance Marketplace Program. The plan and report must be completed and submitted to the Joint Committee on Ways and Means prior to the beginning of the 2016 legislative session. This plan and report must include at a minimum:

- A narrative description of each campaign;
- The total amount of biennial expenditures of each campaign;
- The goals and objectives of each campaign;
- The expected results of each campaign activity; and
- Identification of the quantitative measures that directly demonstrate the effectiveness of the campaign with respect to the goals of the campaign.

It is the intent of the legislature that the information provided by the plan and report is to be used to formulate potential Key Performance Measures related to the expenditure of funds for the publication, promotion, and outreach efforts undertaken by the agency."

In accordance with the budget note, DCBS submitted a publicity and publication plan and report to the Joint Committee on Ways and Means in January prior to the 2016 session. The report gives a brief introduction, noting that 137,820 Oregonians have enrolled in health insurance through the marketplace as of January 16, 2016; 25,000 more people than the prior year. The report is subsequently organized in to headings that comport with the elements required in the budget note.

The narrative description of each campaign section includes a brief discussion of the philosophical reasoning in approaching the planning of the campaign; stressing the ideas of local control of message, access to local informational resources, and the importance of market research. DCBS segmented the plan in to two outreach and education campaigns; one for the 2016 plan year and

one for the 2017 plan year. It is notable that although the 2016 campaign plan is well detailed in the report, there is no detail provided for the 2017 campaign. DCBS states that it believes the 2017 campaign will be similar in scope and tactics as the 2016 campaign, but that DCBS will begin planning the 2017 campaign only after it has had time to analyze the results of the 2016 campaign.

The 2016 plan reads much more like a report than a plan since the majority of the research and planning had taken place and the 2016 Open Enrollment period was almost over. However, DCBS was able to lay out, in sufficient detail, the methodology for developing the campaign, the information gained from its research activities, and the tactical activities through which the agency would be implementing its campaign. The 2016 campaign focuses on targeted activities and markets, eschewing mass-media campaign activities that are pursued by the federal marketing program in order to avoid duplication of effort and to address specific populations that have a high percentage of uninsured individuals.

Of the \$2.3 million budgeted in the current biennium for marketing, publicity, or promotion, the 2016 plan year campaign accounts for roughly \$2.0 million. DCBS has requested an increase in its expenditure limitation of \$1.7 million to fund the 2017 plan year campaign at the same level as the 2016 campaign. In the report, DCBS provides a breakout of planned expenditures in both campaigns by general activity including: paid media, creative services, earned media, community partnerships, and research and account services.

DCBS provides three specific goals for the 2016 campaign:

1. Maintain the percentage of qualified health plan, subsidy-eligible people who enrolled in insurance through the Marketplace
2. Define the percentage of people who actively (vs. passively) re-enrolled via the Marketplace at the end of the campaign
3. Build a trusted, credible reputation among current and potential customers of the Marketplace and overall positive reputation among key stakeholders

For each of the goals, DCBS provided narrative context for the selection of the goal. Each of the goals are stated so that quantifiable metrics can be established and monitored.

In the section detailing the expected results of each campaign activity, DCBS reiterates the activities listed in the campaign narrative section, further detailing the activities and relating the anticipated result of the activity to the specific goals of the campaign. As noted in the plan and report, since this is the first year that DCBS has conducted the marketing and outreach campaign for the Marketplace, it has not set specific targets or metrics for the detailed activities. DCBS intends to complete a full review of the campaign following the end of the open enrollment period. DCBS also included potential key performance indicators and potential metrics for each of the goals.

Although DCBS has provided significant detail regarding the 2016 plan year campaign and preliminary campaign results data. It may be useful to have the agency submit a follow-up report to the Emergency Board on the full review of the campaign and the agency's plan for 2017 open enrollment year campaign, including base-line metrics for the campaign goals during the September 2016 Legislative Days.