

**MEMORANDUM**

To: Health Connector Board Members  
Cc: Louis Gutierrez, Executive Director  
From: Jason Lefferts, Director of Communications  
Date: June 3, 2016  
Re: Outreach and Marketing Procurement

**EXECUTIVE SUMMARY**

The Health Connector’s annual Open Enrollment outreach and messaging campaign is designed to support the Health Connector’s central and founding mission, which is to connect uninsured residents in Massachusetts to coverage and ensure that current members are able to easily shop and renew for coverage. The 2016 Open Enrollment outreach and public messaging campaign was part of a holistic organizational effort that led to significant new enrollments and a retention rate of over 94 percent. The Health Connector remains committed to continuing to close the gap of uninsurance in Massachusetts. Research shows the relatively small number of uninsured people includes not only the chronically uninsured, but those with short-term gaps as they churn and transition between sources of coverage. Ongoing outreach and education is necessary to continually educate and enroll uninsured residents, and to ensure that those who may be experiencing a coverage gap or may be vulnerable to losing coverage know where to go for help.

The Health Connector launched a procurement for marketing and outreach vendors in order to ensure messaging during annual Open Enrollment periods and throughout the year highlights the Health Connector’s role as the state’s health insurance Marketplace for those needing access to affordable coverage and conveys that role in a clear and compelling manner. The Health Connector recently completed a competitive procurement process that was designed to create the potential flexibility of selecting one or two firms, focusing on priority areas of concentration. To that end, Health Connector staff recommend that Weber Shandwick, a marketing and public relationship company, handle general outreach and marketing activities and Archipelago Strategies Group, a marketing and communications consulting firm specializing in communicating to diverse audiences, lead ethnic media and community outreach and marketing. These companies will work in coordination with one another and under the Health Connector’s close oversight to build upon the successful outreach and marketing campaigns of previous years, and we ask the Board’s approval to enter into contracts with these two entities.

**BACKGROUND**

As part of its fundamental mission, the Health Connector is at the center of the Commonwealth’s effort to provide access to health care to every resident in need of coverage. The Health Connector is the only platform for individuals and families without insurance from their employer, or without insurance through a public program, to access a wide range of affordable health coverage options and where subsidies may be available to bring down the cost of monthly premiums and out-of-pocket expenses.

Delivering on this mission requires that the Health Connector and its services are made aware to residents who are in need of the coverage it offers, may have family or friends that need it, or may need it themselves in the future. This is accomplished effectively through a wide range of awareness raising and consumer assistance tools and campaigns ranging from providing in-person assistance to people enrolling (*e.g.*, our Navigator program) to media-based awareness-raising strategies (*e.g.*, our marketing efforts).

To the second point, the Health Connector has long worked with a vendor to help lead its overall marketing and messaging efforts. Since its inception in 2006, this role has been played by Weber Shandwick. This spring, the Health Connector undertook a new procurement process to re-explore vendor options. In preparing for this procurement, the Health Connector reviewed its Open Enrollment 2016 strategy and ongoing commitment to target communities with higher rates of uninsurance, and prepared a procurement strategy to maximize flexibility and create the potential for a stronger effort for Open Enrollment 2017 and onward.

The Request for Proposals (RFP) was broken into two parts. The first part covered the general elements of the outreach and marketing campaign, including creative development, production, corporate partnerships and social media work. The second part focused entirely on ethnic media and community outreach and marketing. State data indicates a disproportionate share of the state's uninsured population includes residents from ethnic communities, making culturally and linguistically fluent messaging through ethnic media in targeted communities of paramount importance. A priority for this procurement was ensuring the Health Connector continues to expand its presence on these platforms. Through this RFP design, the Health Connector positioned itself to consider one bidder for the entire procurement, or separate bidders for each portion, if bidders were found to be particularly strong in one section. The overall goal of the procurement was to maintain the high quality and successful messaging of previous campaigns, while further strengthening the Health Connector's ability to conduct outreach in priority communities across the Commonwealth.

---

## PROCUREMENT PROCESS

---

On April 4, 2016, the Health Connector released an RFP for its outreach and marketing campaign. The RFP included two independent sections, with one for outreach and education and the other for ethnic media outreach and education as described above. Bidders were allowed to bid on one or both sections. The Health Connector received eight proposals. The procurement management team (PMT), comprised of five voting Health Connector staff members as well as non-voting members from the Health Connector finance and legal teams, reviewed and scored the eight written proposals over four weeks. The three bidders with the highest scoring written proposals were invited to give oral presentations, which occurred on May 20, 2016.

Based on the information supplied by the bidders through their written proposals and oral presentations, the PMT scored the bidders based on a pre-determined set of criteria. The Health Connector considered the overall strength and value of the proposed marketing campaign, the background and knowledge of

the bidder’s team, and the metrics to be used to determine the short- and long-term effectiveness of the campaign.

**PMT Scoring for General Outreach and Education**

	Total Points	Weber Shandwick	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6	Bidder 7	Bidder 8
Outreach and Marketing Campaign	65	60	52	48	39	31	26	28	21
Program Goal Metrics	10	8	6	6	8	3	3	6	1
Team Composition and Experience	10	10	9	8	6	5	8	5	5
Financial Proposal	5	3	3	5	2	4	4	1	4
Overall Value	10	9	7	7	4	2	2	2	2
Total Written Response Scores	100	90	77	74	59	45	43	42	33
Overall Presentation	25	18	22	16					
Questions & Answers	25	15	20	18					
Total Oral Presentation Scores	50	33	42	34					
Total PMT Score	150	123	119	108	59	45	43	42	33

Through its written response and oral presentation, Weber Shandwick displayed the ability to continue to manage the Health Connector’s broad messaging outreach, education and marketing goals, and demonstrated its position as the most experienced agency regarding audience research, messaging and creative development, and overall messaging strategy. Weber Shandwick has worked collaboratively with the Health Connector on outreach, education and marketing since 2006, and has experience working with other exchanges, such as Covered California, as well as the federal healthcare marketplace. Weber Shandwick’s history of providing consistently strong materials and comprehensive marketing plans to the Health Connector, along with displaying new, compelling potential messaging ideas during the procurement process, instills confidence in Health Connector staff that Weber Shandwick will continue to be a valuable partner in the Health Connector’s general outreach, education and marketing efforts.

**PMT Scoring for Ethnic Media Outreach and Education**

	Total Points	Archipelago	Bidder B	Bidder C	Bidder D	Bidder E	Bidder F	Bidder G	Bidder H
<b>Ethnic Media Outreach and Marketing Campaign</b>	55	55	45	32	31	30	21	23	12
<b>Program Goal Metrics</b>	10	6	8	6	6	3	8	3	1
<b>Team Composition and Experience</b>	20	18	17	12	11	8	9	9	6
<b>Financial Proposal</b>	5	5	3	3	1	4	2	4	4
<b>Overall Value</b>	10	10	8	8	6	4	4	2	5
<b>Total Written Response Scores</b>	100	94	81	61	55	49	44	41	28
<b>Overall Presentation</b>	25	16	18	22					
<b>Questions &amp; Answers</b>	25	18	15	20					
<b>Total Oral Presentation Scores</b>	50	34	33	42					
<b>Total PMT Score</b>	150	128	114	103					

Through its written response and oral presentation, Archipelago Strategies Group proved to be knowledgeable and resourceful in the areas of ethnic media and community outreach. It matches a deep understanding of the Commonwealth’s ethnic populations with experience messaging those populations. Founded in 2013, Archipelago is a Boston-based marketing company with expertise in marketing, public relations, community engagement, social media as well as messaging creative design and production. With its extensive experience working with the state’s ethnic communities, including the ability to identify specific messaging to different nationalities and ethnicities unique to different regions of the Commonwealth, the Health Connector is confident Archipelago will bring the tools and energy required to further expand on the Health Connector’s already-strong outreach, education and marketing to important communities that will benefit from knowing about the Health Connector and its coverage options.

This vendor’s work will be informed by research from the Blue Cross Blue Shield Foundation and the Center for Health Information and Analysis that soundly details the characteristics of the remaining uninsured in the Commonwealth. Uninsured individuals are predominately low income and are more likely to reside in Metro Boston, as well as in Central and Western Massachusetts. Additionally, non-elderly adults, men, Hispanic individuals and Black, non-Hispanic individuals have higher-than-average

rates of uninsurance.<sup>1</sup> This information will be incorporated into the design of our outreach and messaging campaigns in order to ensure that residents of all ethnicities and communities in the Commonwealth are able to share in the benefit of the coverage and services available through the Health Connector.

---

### SCOPE OF WORK

---

The Health Connector and the two winning bidders, Weber Shandwick and Archipelago Strategies Group, will work collaboratively on a comprehensive outreach, education and marketing plan that will target the state's uninsured population – both chronically uninsured and those with short-term gaps in coverage – along with members and the general public. Research data, messaging points, creative elements and production will be exchanged by the two vendors throughout the campaign in a collaborative and coordinated fashion to ensure mutually complementary goals are reached.

Specifically, Weber Shandwick will be the lead agency on audience research (including conducting focus groups around the state), creating appropriate messaging concepts, producing pieces and delivering placements on a variety of platforms (including out-of-home and digital outlets), directing corporate partnership opportunities, and leading social media efforts above and beyond a digital marketing campaign.

Archipelago will be the lead agency on outreach, education and marketing to the state's ethnic populations, focusing on Spanish, Portuguese, Chinese, Haitian, Cambodian and Vietnamese populations. Archipelago will be responsible for identifying high-impact platforms and outlets, creating both paid and earned media opportunities, and identifying premium events in communities of high importance in which the Health Connector can participate to increase visibility and awareness.

---

### KEY CONTRACT TERMS

---

**Term of Contract:** The term of the contract will be July 1, 2016 through June 30, 2018, with four optional one-year extensions. The total annual budgeted amount for this campaign is not to exceed \$2.5 million. Weber Shandwick will be budgeted an annual amount not to exceed \$1.5 million and Archipelago will be budgeted an annual amount not to exceed \$1 million.

Through their joint efforts, Weber Shandwick and Archipelago will:

- Conduct market research to identify effective messaging that resonates with the state's uninsured population;

---

<sup>1</sup> Skopec, Laura, Sharon K. Long, Susan Sherr, David Dutwin and Kathy Landgale. Center for Health Information and Analysis. "Findings from the 2014 Massachusetts Health Insurance Survey" May 2015.  
Long, Sharon K. and Thomas H. Dimmock. Blue Cross Blue Shield Foundation of Massachusetts and the Urban Institute. "The Geography of Uninsurance in Massachusetts, 2009-2013." April 2015.

- Design a marketing and outreach plan that includes a wide variety of platforms (radio, print, digital, out-of-home and other opportunities), reaches a wide variety of priority communities and maximizes value for the Health Connector;
- Develop creative messaging that highlights the Health Connector's unique position as the entity offering financial subsidies and quality health plans to eligible applicants;
- Create messaging pieces that are engaging and attractive to viewers and listeners;
- Extend and develop corporate partnership opportunities that further the Health Connector's outreach, education and marketing goals; and
- Provide social media support and define new social media opportunities.

---

#### **BOARD RECOMMENDATION**

---

Health Connector staff recommend that the Board vote to enter into a contract with Weber Shandwick as described above with a budget not to exceed \$1.5 million per year for services performed between July 2016 and June 30, 2018, with four optional one-year extensions. Staff also recommend that the Board vote to enter into a contract with Archipelago Strategies Group as described above with a budget not to exceed \$1 million per year for services performed between July 1, 2016 and June 30, 2018, with four optional one-year extensions. Funding for this activity will be included in the Health Connector's Fiscal Year 2017 Administrative Budget, which will come before the Board for consideration at the July 14, 2016 meeting. Work under these contracts will occur only if funding for it is approved in the budget by the Board.

We look forward to presenting the above information and providing our formal recommendation at the Health Connector Board of Directors meeting on June 9, 2016.