

# Outreach Planning 101

As your group or organization develops outreach plans, strategies, and materials to reach consumers, there are several questions you should keep in mind (see section 1). Remember that your answers to these questions may change over time and may differ from project to project, so keep this document handy as your plans and materials evolve. This guide also includes a quick list of ways to inform people about the new health coverage options (see section 2), as well as a worksheet you can fill out to help you gauge the success of your outreach work (see section 3).

This fact sheet covers three main topics:

1. General Outreach
2. Ways to Spread the Word about the New Health Coverage Options
3. Tracking Your Efforts

## 1. General Outreach

### What audiences do you have or could you gain access to?

- Uninsured consumers
- Validators: people who can facilitate your work with a certain community by tacitly acknowledging your importance with their core constituencies
- Messengers: people who can deliver your message to specific audiences through the media, events, etc.
- Amplifiers: people who have access to larger audiences and who can deliver your message to this wider universe of people
- Internal audiences: staff, board members, donors, clients, and community partners
- External audiences: membership organizations (like the Rotary club, faith-based groups, or PTAs); college campuses; community events or conferences; entities that have access to uninsured consumers (like unemployment offices or public health departments)

### What is the best way to convey your message?

- Always consider the audience: Who you are trying to reach?
  - Families?
  - Young adults?
  - Specific racial, ethnic, religious, or cultural groups?
- Who are the best messengers to reach each of those groups?
  - Trusted organizations?
  - Community members?
  - Partner organizations?
  - Local health care professionals?
- What is the best setting where you can engage your target audience and have a conversation about health insurance?
  - Where is your target audience more likely to be willing to engage in a conversation about health coverage? (For example, people are more likely to be willing to talk about this issue outside of a library at a community college vs. at a bar.)

- ➔ When are your messengers most effective?
  - When they are comfortable providing the information listed below to people in a brief, clear manner (but not so casually that it diminishes the importance of the information).
  - When they can capture information about whom they are reaching and have a plan to enter that data and use it to follow up later.
  - When they can provide information about where people can apply for coverage and get assistance, combined with the following messages:
    - Health insurance is available that will cover all the care you'll need.
    - Financial help may also be available, depending on your income.
    - You will not be denied coverage if you have a pre-existing condition.
    - All of the insurance plans that will be available through your state's new marketplace will have to show how much the plans cost and what is covered in simple language with no fine print.
  
- ➔ Is the best messenger a partner group or entity with whom you could do outreach together?
  - Identify likely candidates that would also want to get people enrolled in health coverage and that might want to partner with your organization.
  - Call and introduce yourself, explain your objectives, and seek common ground.
  - Learn about their capacity and communication systems.
  - Be open minded, listening for new ways they can help you reach uninsured consumers.
  - Gauge their interactions with consumers and how to best structure the partnership.
  - Develop a tracking system to document your contacts and any follow-up conversations.

**TIP** ➔ Ask groups you meet with to share information about your organization's work at their next meeting to help reignite the conversation about the new health coverage options and where consumers can go for assistance.

## Materials

- ➔ Electronic and printed materials work too, but when is it best to use them? Use them when....
  - You want to reach a lot of people at once
  - You want to create a buzz that you can reinforce when you meet consumers in person

**TIP** ➔ Make the imagery and presentation on any printed materials relevant and appealing to the intended reader by using culturally and linguistically appropriate images and messages. Keep extra print materials with you at all times—you never know when you'll meet someone who can help your outreach efforts. Ask people you talk with to tell a friend. And always keep it short and simple (KISS).

## How can you follow up with consumers?

- ➔ Follow up, follow up, follow up...in any way possible!
- ➔ Set up a phone bank where your staff and/or volunteers call consumers about the new health coverage options.
- ➔ Send appointment reminders to consumers who are receiving application assistance from your organization via email, text, or mail.

## 2. Ways to Spread the Word about the New Health Coverage Options

There are lots of ways you can let people know about the new health insurance marketplace in your state and about the other changes in health coverage. Some of these actions require a little planning and effort, but many take just a few minutes. In the table below, we've divided activities into categories so that you can easily figure out what will work for you and your organization based on your time and resources.

Actions that Take Minimal Planning	Actions that Take Some Planning	Actions that Take More Planning
Post information about your state's marketplace and links to it on your organization's website and on community websites.	Highlight information about the marketplace in local publications, community listservs, and in e-newsletters of partner organizations or local groups.	Host education and enrollment events in your community during open enrollment.
Add links to your state's marketplace to email signatures in outgoing emails.	If your organization has an "on hold" feature on your phone, use a script on the phone system or on your intercom to record messages about the marketplace.	Recruit volunteers to hold a phone-a-thon.**
<p>Disseminate information to target audiences through your organization's previously scheduled communications, such as action alerts and direct mailings.</p> <p>Include outreach messages in all of your listservs and newsletters at least twice.</p>	<p>Incorporate marketing messages, materials, and/or speakers into planned events, such as community workshops, health fairs, festivals, and educational events.</p> <p>Always have materials on hand to distribute, and encourage folks to take more and to tell a friend.</p>	Provide high-visibility opportunities for your organization to talk about the marketplace. For example, your group could draft an opinion piece for a local paper, appear on a panel at a conference, or give remarks at a press event.

\*\* To learn more about how to hold a phone-a-thon, go to [www.enrollamerica.org](http://www.enrollamerica.org).

### 3. Tracking Your Efforts

It's always important to take time to reflect on your outreach strategies to make sure you're using time effectively. Below are some suggestions on how to think about how you spent your time and the results you achieved.

#### Resources Used

Preparation for the event took \_\_\_\_\_ staff hours

Working the event took \_\_\_\_\_ staff hours

Follow up after the event took \_\_\_\_\_ staff hours

The cost of the event / tactic (excluding staff time) was \_\_\_\_\_

#### Direct Contacts

I / We identified \_\_\_\_\_ individuals/ families who plan to apply for a qualified health plan

I / We scheduled \_\_\_\_\_ individuals/ families for application assistance appointments

I / We distributed \_\_\_\_\_ brochures, fliers, or other materials to consumers

The contacts I/we made led to \_\_\_\_\_ completed applications

#### Messenger Contacts

I / We spoke with \_\_\_\_\_ messengers about the marketplace

I / We distributed \_\_\_\_\_ brochures, fliers, or other materials to messengers

#### New Leads and Contacts

I / We received \_\_\_\_\_ opportunities to reach new audiences (inclusion in newsletters, future presentations, etc.)

I / We connected with \_\_\_\_\_ possible partners for future work

#### Comments/Notes

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*Adapted from a guide created by Samantha Shepherd and Jessica Kendall for the Oregon Office of Healthy Kids outreach partners in 2010.*