

## Title: “it’s about choices” Open Enrollment Campaign

### North Shore-LIJ Health System

## Summary

### SITUATION ANALYSIS

To remain a leader in the marketplace, North Shore-LIJ Health System, the nation’s third largest non-profit, secular healthcare system and one of New York’s largest employers, offers generous and comprehensive healthcare benefits for 16,000 deserving employees and their dependents. Even in difficult economic times, the organization continues to pay over 87% of employees’ healthcare costs, and provides a free health plan option for staff-level employees and their dependents. In previous years, benefits automatically rolled-over and employees typically ignored Open Enrollment, despite new plan offerings and positive enhancements. In 2009, the majority of employees remained in the most expensive plan and less than 16% of eligible employees took advantage of the free health plan.

Having previously relied solely on print collateral and mail to communicate benefits during Open Enrollment, the internal communications team identified missed opportunities to engage and educate employees about their healthcare options. Findings from focus groups and surveys showed that employees were unaware of their benefits choices, unclear about the value of their benefits, and believed that benefits communications needed the most improvement among all employee communications. As a result, in fall 2009, the communications team launched a comprehensive multi-media campaign about new health plan “choices” to raise employee awareness and appreciation of the value of healthcare benefits during difficult times.

### RESEARCH

In preparation for the Open Enrollment campaign, the internal communications team conducted 15 targeted employee focus groups at various hospitals system-wide and distributed surveys to each group to determine employee engagement as a result of previous benefits communications. The findings revealed that employees:

- Were unaware of their benefit options,
- Did not understand the healthcare benefits offered to them,
- Did not feel their benefits were valuable nor did they feel valued by their generous benefit plans,
- Believed that benefits communications needed the most improvement among all employee communications.

Furthermore, extensive analysis of employee benefits enrollment showed that in 2009:

- Only 881 employees (approximately 5% of the overall target audience) made a change in their benefit plans,
- Less than 16% of the eligible target audience was taking advantage of the free health plan,
- Only 20% of the overall target audience was enrolled in a healthcare flexible spending account.

### PLANNING

The **primary goal** of the campaign was to clearly explain the new health plan choices for Open Enrollment 2010 to ensure employees had a solid understanding of the value and selection of their healthcare benefits, and to ultimately motivate employees to take action during Open Enrollment. The **secondary goal** comprised emphasizing the valuable choices employees were being given during difficult times.

Measurable objectives included:

- Increase the number of employees who changed their health plan by at least 10 percent,
- Increase the number of employees who enrolled in the free health plan by 10 percent,
- Increase enrollment in a healthcare flexible spending account by 5 percent.

The **overall target audience** included approximately 16,000 benefits-eligible employees across more than 30 metro New York hospitals and administrative offices. However, given three levels of employee healthcare benefits, the target audience was broken into three categories: Benefit Group 3 (included 10,423 staff-level employees, the only group eligible for the free health plan); Benefit Group 2 (included manager-level employees) and Benefit Group 1 (senior-level employees and physicians). The **strategy** implemented to achieve the objectives was centered around creating a multi-media campaign with target-specific print

collateral, online tools, educational resources and interactive presentations to address concerns, make information easily accessible and to spark employee dialogue in comparison to the previous “one-size-fits-all” print/mail approach. The **budget** for this monumental Open Enrollment campaign was limited to \$80,000. The majority of collateral was created in-house and printed through discount vendors, making postage the primary expense.

## EXECUTION

Aside from a very limited budget, North Shore-LIJ faced many challenges in executing the communications campaign for Open Enrollment 2010. Not only were new health plan options being offered, but the new healthcare plans were structured differently and varied in cost depending on the employee’s Benefit Group. In the past, Open Enrollment communications consisted of only print/mail materials, so employees were unaccustomed to various media channels and were not actively exploring their benefits options. The communications team felt that in addition to a multi-format and educational approach, comprehensive, targeted benefits guides needed to be developed, showing costs for the new health plans up front for the first time in the company’s history. Each guide was customized with messaging relevant to the target audience.

## Tactics

Beginning only two months in advance, the “it’s about choices” Open Enrollment campaign launched in fall 2009 via the following chronological mediums:

1. Preview brochure and cover letter mailed home (*Attachments A-1, A-2*)
2. Three targeted Open Enrollment guides with personalized costs for the first time (*Attachments B-1, B-2 and B-3*)
3. Dedicated website: [www.northshorelij.com/OpenEnrollment](http://www.northshorelij.com/OpenEnrollment) (*Attachment C*)
4. Cover story in the employee benefits magazine, *Transforming Your Care* (*Attachment D*)
5. E-mail blasts with quick links to online tools (*Attachment E*)
6. Online learning tutorial of healthcare benefits and Flexible Spending Accounts (*DVD, Attachment F*)
7. Benefits Blog for employee questions/answers: [www.nsljbenefits.blogspot.com](http://www.nsljbenefits.blogspot.com) (*Attachment G*)
8. Manager’s Guide to Open Enrollment available via print, e-mail and online (*Attachment H*)
9. Employee Roadshow Presentation which took benefits experts on the road for two months, presenting at more than 175 employee sessions to educate and answer questions (*Attachment I*)

## EVALUATION

The “it’s about choices” campaign rolled out from September 15 to November 29, 2009 and exceeded all expectations. The campaign received overwhelmingly successful results, making it the most productive Open Enrollment in North Shore-LIJ’s history. The results are best captured in the **enrollment metrics**, which met all the measurable objectives outlined above:

- 6,171 employees or 39% of the overall target audience changed their health plan for 2010, a **34% increase year-over-year**; of that group, 4,308 employees, or **70%**, changed their health plan from the most expensive option to a less expensive option, directly indicating that employees understood the value of their benefits during difficult economic times
- More than 3,147 of the eligible target audience enrolled in the free health plan, which is a **17% increase from 2009**
- More than 5,171 of the overall target audience enrolled in a healthcare flexible spending account, which is a **13% increase from 2009**

Post-Open Enrollment surveys with over 1,385 responses showed:

- 93.5% of employees reported, “I understand the value of my benefits as a North Shore-LIJ employee”
- 92% of employees reported, “I understand the benefit choices that North Shore-LIJ offers me”
- 91.8% of employees reported after attending the benefits “roadshow” presentation, “I now understand more about the new health plans for 2010”

The online media participation garnered the following results:

- 5,808 absolute unique visitors used the Open Enrollment website, resulting in nearly 29,000 page views
- 21,000 blog hits, including 265 employee questions and comments in less than two months
- 965 employees accessed the online healthcare benefits tutorial and 912 employees accessed the online flexible spending account tutorial