

# Outreach as a MNsure Partner

## Session Objectives

* Teach participants MNsure’s relationship to their organizations’ goals, strategies, and tactics; enable them to understand that effective outreach tactics will be the focus of MNsure’s Outreach Curriculum.
* Teach participants that different outreach activities carry varying levels of power or potency, and that the type of tactic needed will depend on the desired outcome.

## Training Materials

* Visual aid (PowerPoint, projector and screen; can be transferred to flip chart)
* Key Concepts handout (to be given to participants at the end of the session)
* Blank paper, ideally 8x10 (enough at each table for 1-2 sheets per person)
* Markers (5-6 per table)
* Blank flip chart pages (1 page per table)
* Tape
* 3 flip chart pages, each with the definition of “goal”, “strategy” & “tactic”, taped to the wall
* Tactic Cards (1 set of 16 cards per small group)
* Engagement Scenarios (1 scenario per small group)
* Reward for winning team (you create; can be a certificate, goodie bag, etc.)

## Room Setup

Participants should be seated at tables accommodating 4-5 people. You will need ample wall space to tape up several pieces of 8x10 paper and three flip chart pages. This module includes an interactive icebreaker; space for participants to stand and move around is ideal.

## Topics Covered

* A Conversation on Goals & Strategy
* The Power in Your Tactics

## Facilitator Notes

This is a 95-minute session. It is discussion and exercise-heavy. A summary of each section and its activities can be found under “Section Notes”, while some cues also exist in the Facilitator Script in bracketed italics. When appropriate solicit stories from participants, though be mindful of the dynamic of the room; if the group is a mix of metro and Greater MN assisters, ensure that stories and examples are being shared from all areas of the state.

**WELCOME & INTRODUCTION**

**(5 minutes)**

**Section Notes**

*In this section you should introduce yourself and the agenda for the day. Share some information about who you are (e.g., where you live, what your favorite part of your job is, a fun fact, etc.). Once you have introduced yourself, preview the session agenda, the location of the training space amenities, and encourage people to participate fully.*

**Facilitator Script**

* Hello everyone, and thank you for coming! My name is *\_\_\_\_\_\_\_\_\_\_* and I am the *[title]* at *[organization].*
* Welcome to our session on conducting Outreach as a MNsure Partner!
* In the next two hours, we will discuss:
	+ Goals & Strategy
	+ The Power in Your Tactics
* There are a few things I’d like to point out before we get started:
	+ Bathrooms are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ If you’d like to grab some refreshments, they are located \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* I also want to encourage everyone to participate as much as they can today. There is a lot of wisdom in this room, so the more people participate, the more we all will learn!

**ICEBREAKER & GROUP INTRODUCTIONS: LINKS**

**(10 minutes)**

**Section Notes**

*Have everyone get into a circle, facing each other. Have one person stand in the center of the circle and share a fact about themselves. If that fact also applies to other people in the room, have them race to the center to link arms with the first person. Only the first person who arrives should link arms, while all others must go back to the circle. This process should continue until everyone has linked arms, closing the circle.*

*If a fact that is shared does not apply to anyone, no one should link arms and the person should continue sharing things until someone does link. There will inevitably be one last unlinked person before the circle closes, at which point the second to last person to join the chain should continue to share facts until they find one that applies to the final person and they join the group.*

*Remember to make accommodations for participants as necessary. For example, if someone can’t race on foot, have people raise hands or clap in order to “race” to join the chain.*

**Facilitator Script**

* Before we dig into our topic today, I’d like to spend some time getting to know about everyone in the room. We’re going to start with an icebreaker called “Links”.
* First, we’ll need everyone to stand in a circle. We’ll choose one person to start, and that person will stand in the center of the circle.
* The person in the center will then say their name, their role and organization, where they live, and one thing that is true about themselves—it can be anything!
* If the thing that the person said also applies to you, for example, the person says they went to college at the University of Minnesota and you did, too, you would come up and link arms with them.
* The catch is, only one person can link arms with the person at a time. So if more than one person starts to move, you have to race to see who gets there first.
* If you are the person who gets to link arms, then it becomes your turn to share one thing about yourself.
* We’ll keep going until everyone has linked arms.
* *[Choose the person who will go first. You could consider being first to go so you can demonstrate, or you can choose some other way—for example, by who has the longest or shortest hair. Have each participant go until everyone has linked arms.]*
* *[Debrief the exercise while everyone remains linked:]*
	+ We are all coming into this session today with different stories—we have different experiences, we are from different parts of the state, and we work for organizations with different missions.
	+ If we look closely enough, however, we can find our commonalities, and it is through our commonalities that we will work together toward success.

**A CONVERSATION ON GOALS & STRATEGY**

**(20 minutes)**

**Section Notes**

*The purpose of this section is first to bring participants to the conclusion that all MNsure grantees and their partners share the same overarching goal (to find people who are uninsured and get them to complete the MNsure enrollment process). You will do this by asking participants to write on blank 8x10 paper why they care about helping people access affordable coverage, taping the papers to the wall, then debriefing peoples’ answers. Next, help participants understand that the ways in which individual organizations work to achieve the shared goal— the strategies we use— will vary widely due to the unique needs of the communities we serve. Let participants know that as partners in MNsure outreach, it is MNsure’s hope that assisters will feel empowered to make their own decisions as to which outreach strategy best addresses the barriers to enrollment that their communities face.*

**Facilitator Script**

* As MNsure assisters, we are here today because we care about helping people in our state access affordable health insurance coverage.
* To get us started today, I’d like to hear about why you care about that.
* *[Give participants 2-3 minutes to answer what is at stake for them, or why helping communities access affordable insurance is important to them. Have them write their answers on blank 8x10 paper and tape the papers to the wall in front of the room. When everyone has taped their paper up, read a few answers aloud. Ask people to elaborate on what they wrote, and try to highlight a few that are different from the others.]*
* We can see from these answers that we all come to this work from different perspectives and for different reasons.
* Despite this, however, can we all agree that **we still share a common, overarching goal**: to find people who are uninsured and get them to complete the MNsure enrollment process?
	+ *[Ask people to nod, raise their hands, or give a thumbs up if they agree.]*
	+ *[Present the pre-written “GOAL” definition on flip chart paper and tape to the wall. The definition should read, “To find the uninsured and get them to complete the MNsure enrollment process”.]*
* Despite having a shared ultimate goal, the way in which we hope to achieve that goal tends to vary for several reasons:
	+ We all work in vastly different communities: different parts of the state (rural, suburban, metro); different demographics; communities of people with vastly different experiences with healthcare; etc.
	+ Because of the differences in the communities we serve, the people we serve often experience varying barriers to accessing affordable health insurance coverage, which means that they need different “treatment” in order to have their needs met.
* Thus, **every assister organization will have to rely on different strategies** to reach our shared goal:
	+ *[Present the pre-written “STRATEGY” definition on flip chart paper and tape to the wall. The definition should read, “The unique plans of action we create in order to address the barriers to enrollment faced by our individual communities”.]*
	+ For some, it makes the most sense to rely on **mass education campaigns**: identifying those who don’t yet understand what MNsure is or how it can help them and inviting them to attend presentations on the benefits of MNsure.
	+ For other assisters, people in their communities need to be given **ample opportunity to enroll with an assister** when and where it’s most convenient for them: those assisters may choose to host open office hours or enrollment events where people live, work, and play.
	+ Still, for others, the issue is simply that the people they serve need frequent reminders of the importance of getting covered. In situations like that, simple **saturation of the community with MNsure’s message** (i.e., social media ads; flyers; radio PSAs; text message campaigns) will do.
	+ Many organizations come to the conclusion that some **combination of these methods** is necessary.
* I’d now like you all to turn to the people sitting at your table. At your tables, I’d like you to discuss some of the strategies that each of your individual organizations have relied on to get people to enroll. Together, answer these questions:
	+ What barriers do people in your community face to enrolling?
	+ How do you help people overcome these barriers?
* Remember that we are only talking about strategy here—the big picture ideas we all have to help address our community’s needs. Keep your conversations on the big picture—we will talk about exactly how we connect with people to carry out our strategy a little later.
	+ *[Give people 7 minutes to group up and briefly discuss their strategies. Let them know when they have 3 minutes left, then 1 minute, then when to stop. While they are discussing, walk around the room and listen in; if any group seems to be lingering too much on the minutiae or digging into tactics, re-direct them to a big-picture conversation on strategy.]*
* *[Discuss:]* How did your conversation go?
	+ Was anything surprising to you?
	+ Did anyone at your table share similar barriers to yours? If so, did you have the same way of addressing those barriers?
* MNsure believes that you all— trusted leaders with years of institutional knowledge about how best to serve the people in your communities—are **the best possible people to make decisions on strategy** when it comes to finding and enrolling the uninsured.
	+ You know better than anyone the barriers that exist in your community and what people in your community respond to, which means you also understand better than anyone how to address those barriers.
	+ It is for this reason that MNsure has made a conscious effort not to take a prescriptive, “one size fits all” approach to statewide outreach.
* Instead, it is MNsure’s hope that you will feel empowered to make your own decisions as to which outreach strategy best addresses your own community’s needs; and that you will continue to incorporate our shared goal of enrolling the uninsured into your work **in a way that makes sense for your organization and its unique values and vision.**
* This partnership will result not only in an expansion of MNsure’s reach across the state, but in the very real and unique barriers to enrollment that Minnesotans face being fully and appropriately addressed.

**THE POWER IN YOUR TACTICS: DISCUSSION**

**(20 minutes)**

**Section Notes**

*The purpose of this section is to get participants to understand that regardless of the strategy their organization adopts, the first step to fulfilling that strategy is to find and engage people—we do this work using a variety of tactics. While MNsure cannot prescribe strategy, it can provide guidance on how to use effective tactics.*

*In this section participants will be asked to get into small groups and discuss the most successful events they have ever been a part of: what the event was, why it was successful, and what tactics they used to get people there. Groups will record the tactics they discuss on flip chart paper, then share their tactics with the large group.*

*In a large group discussion, bring participants to the conclusion that although our outreach tactics can be very complex and diverse, not all tactics are going to be effective in helping us fulfill our strategy. That is because different tactics carry different levels of power, or potency— meaning the number of people that a single tactic can realistically engage, and the depth to which it can engage people, varies as much as the tactics themselves. The tactics that we use will depend largely on the number of people we want to engage, and how deeply we hope to engage them.*

**Facilitator Script**

* Now that we’ve spent some time digging into our strategies, let’s take a closer look at the work being done on the ground to implement those strategies, and dig into what you all are currently doing to find people who need enrollment assistance.
* These are what we call your **outreach tactics**.
	+ *[Present the pre-written “TACTICS” definition on flip chart paper and tape to the wall. The definition should read, “The steps you take to find and engage consumers in order to implement your strategy on the ground”.]*
* In order to ultimately help people overcome their barriers, you have to do a three things:
	+ First, you have to find them.
	+ Next, you have to engage them.
	+ Finally, you have to address their needs.
* We know that people do not ordinarily show up to an event or make an appointment with an assister without first being prompted in some way.
* While MNsure cannot make decisions for you as to how you should address consumers’ specific needs—your strategy—**MNsurecan give you guidance on the kinds of tactics you can use** to initially find and engage consumers around health insurance.
* Let’s get back into our small groups and talk a bit about the tactics we’re all using.
* I am going to give you all 7 minutes to discuss **the most successful events each of you has ever been a part of** (they could be enrollment events, informational events, or some other type of event).
	+ First, I’d like you to each share a brief summary of the event: what was it and what was your measure of success for it?
	+ Next, I’d like you to share **what tactics you used to find people and get them there**. Did you call people on the phone? Send out a radio PSA? Put up flyers?
		- As people at your table share the tactics they’ve used to get people to events, record those tactics using the flip chart paper at your table.
	+ Feel free to ask each other questions as you go—this is a chance for you all to learn a bit about what is working for other organizations! Just make sure you leave time for everyone in your group to share.
* Okay, let’s start talking! *[Give the groups 7 minutes to share. Let people know when they have 3 minutes left, then 1 minute, then finally when it’s time to stop.]*
* *[Discuss:]*
	+ How did your conversations go?
	+ *[Ask each small group to tape their flip chart pages to the wall near them and read off the tactics that their members talked about using.]*
* Thanks for sharing, everyone! As you can see, there are a lot of different tactics being used across the state.
* Outreach is a very complex thing; the tactics we use, like our strategies, tend to take many different forms because there are a million different ways we can reach people and communicate with them.
* That doesn’t mean, however, that all tactics are going to be effective in helping us fulfill our strategy.
	+ Has anyone ever used a tactic that didn’t work?
	+ How did you know it didn’t work?
* **Every outreach tactic has different power, or** **potency**—meaning the *number* of people that a single tactic can realistically engage, and the depth to which it can engage people, varies as much as the tactics themselves.
* We have to **use the right tactic** in order to engage our **desired number of people.**
	+ To put this in real terms, let’s imagine my organization has decided that to best serve our community, we need to host lots of educational events on the benefits of MNsure and how to enroll.
	+ Let’s also imagine that we are hosting a big educational event next month at the local community center, and we have a goal of getting 40 people there.
	+ The tactics we would need to use to get people to that event would likely be very different than if our goal was simply to get 10 people to sign up for an email list.

**THE POWER IN YOUR TACTICS: EXERCISE**

**(30 minutes)**

**Section Notes**

*This exercise demonstrates the idea that different tactics have different power, or potency. Participants will return to their small groups and choose a team name. While discussing their name, each team will be given a simple scenario that requires them to engage people, as well as 16 activity cards that list outreach tactics they could use. Groups will then be given 5 minutes to put the list of 16 tactics in order of least to most powerful.*

*After groups have finished ordering their tactics, one person from each group will share their team’s scenario and the order of their tactics. After each group shares, allow for discussion and give feedback on their work. It is important to point out during the large group discussion that an outreach tactic’s power will dictate not only the number of people engaged, but the depth to which they are engaged as well.*

*After every group has shared, choose the team you think did the best job. The winner should be a group that has prioritized some of the tactics that include direct contact with the consumer, driving home the point that the most powerful engagement tactics will almost always include direct, one-on-one conversation. Note, however, that there is no absolute right or wrong way to do this exercise, and the choice of a ‘winner’ will be highly subjective. This session should be very high energy and fun.*

**Facilitator Script**

**Setting up the Exercise**

* To help us better demonstrate the idea of a tactic’s potency or power, we are going to have a little competition!
* I’d like everyone to turn back to their small groups. I’m going to give you all a minute to decide on a team name. While you’re discussing this, I will pass out a set of cards which I will explain in a bit.
* *[Give people time to group back up and discuss a team name while you pass out scenarios and tactic cards to each group. When you’ve finished, ask each group to share their team name.]*
* Your team has received a set of cards: one card is labeled “Engagement Scenario”, and the other 16 cards list different engagement tactics.
* Your job is to organize these cards in order from LEAST to MOST powerful outreach tactic, based on the engagement scenario you have been given.
	+ In other words, which of these tactics is *least likely* to help you engage people to meet your team’s goal - given in your scenario - all the way up to which of the tactics is *most likely* to help you engage people to meet your goal.
	+ Some examples of what will be written on your cards are “sending a newsletter” and “tabling at a community event”.
* You will have 5 minutes to organize your cards, and then someone from your group will report back on 1) your scenario and 2) the order you put your cards in.
* Once every group has reported back, I am going to choose which group I think has the best-ordered cards given their scenario. Any questions?
* Okay! Ready, set, GO!
* *[Give the teams 5 minutes to order their cards. Be sure to keep time and remind teams how much time they have left as they go. Be sure to keep the tone fun, high energy, fast-paced, and lively.]*
* *[Once the time is called, have each group share its scenario, what order group members placed their cards in, and their rationale for why they used the order they did. Provide feedback and ask the large group for input. When everyone has presented, choose a winning team based on which team you feel built the most engaging campaign, and which group you think most prioritized direct, individual contact with the consumer. The winning team members should be awarded a prize of some sort (e.g., a certificate).]*

**Debriefing the Exercise**

* *[Discuss:]*
	+ Was anything difficult about this exercise? What did you learn?
* This exercise is not intended to suggest that some tactics are “good” and others are “bad”.
* Rather, each tactic carries different power— therefore, if you are going to use a tactic that is minimally powerful or engaging— like sending a newsletter or printing ads on grocery store receipts— you have to assume that you’ll either have to do A LOT of that tactic before getting traction, or assume that you will have low-to-modest response.
* Almost without fail, the most potent tactics— the most powerful way to meaningfully engage people— are ones that allow you to have personal, one-on-one conversations.
	+ This is important to know, not only for the sake of hitting your outreach goals.
	+ **These more powerful, personal tactics are also going to be the best way to engage people in a meaningful way**.
	+ Rather than engaging people passively, using powerful tactics means you will be spending your time **getting to know your potential clients**: learning their needs, establishing trust, and better understanding what it is they need in order to enroll.
* *[If participants will be completing the remainder of MNsure’s Outreach Curriculum:]* MNsure’s Outreach Curriculum is built to better equip assisters to use the most effective and efficient outreach tactics to accomplish their unique strategies.
	+ In the next session we will take a deeper dive into the use of powerful outreach tactics and learn how to make decisions about which tactics are right for our communities.
	+ We will also learn about how to build and maintain effective relationships, as well as how to plan and execute effective events in our outreach work.

**For the trainer’s reference, the activity cards include the following tactics:**

* Send mass emails
* Send text messages
* Send robo-calls
* Send personal emails to a targeted list
* Table at a community event
* Write a letter to the editor
* Put up flyers at a community center
* Make personal phone calls to a targeted list
* Print ads on grocery store receipts
* Have staff wear buttons advertising initiative
* Drop literature at resident homes
* Have influential person meet w/ target group
* Create a radio PSA announcement
* Go door-to-door in a targeted neighborhood
* Post on Facebook and Twitter
* Talk to patrons and employees at a busy cafe

**SESSION EVALUATION**

**(10 min)**

**Section Notes**

*The evaluation is an easy way for the facilitator to get a sense of how participants are feeling with the information they just received. If you are continuing on in a long-term support role for the participants, consider making note of how everyone says they are feeling, and checking in later on with those who seem uneasy or unhappy.*

*To evaluate, have participants share one emotion word about how they are feeling after the session (try to have them stick to actual emotions and avoid words like “informed” or “educated”).When everyone has shared, the facilitator should ask 2-3 people to elaborate on their feeling words. Drawing on what has been expressed, the facilitator should then share a lesson related to the day’s topic.*

* We’re nearing the end of today’s session, and I want to thank everyone very much for participating.
* Before we go, I’d like to go around the room and have everyone share one word about how they are feeling coming out of this session. *[Facilitate this process and carry out the full evaluation and lesson referenced above.]*
* In your materials today, you should have received a training evaluation form. To help me continue to make these trainings better, I’m going to ask you to fill out that evaluation form out and return it to me before you leave today. It shouldn’t take long!
* Thanks, again, for participating today! I’m excited to hear all about the great success you will see in the future!
* *[Adjourn.]*