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**A. GENERAL INFORMATION**

1. Date

12/18/2015

2. Department

California Health Benefit Exchange

3. Organizational Placement (Division/Branch/Office Name)

Marketing

4. CEA Position Title

Deputy Director, Marketing

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The mission of the California Health Benefit Exchange, also known as Covered California, is to increase the number of insured Californians, improve health care quality, lower costs, and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and provider that gives them the best value. The proposed CEA B will serve as the Deputy Director of Marketing, responsible for the development of administrative.. technical and research policies related to Covered California marketing efforts.

Marketing is the most visible outward facing component of Covered California, and serves to coordinate consistent, uniform and accurate information regarding all Covered California activities. Its responsibility for messaging and marketing assets developed based on demographic research and broadcast via television, radio, billboards, print and social media has a profound effect on the primary mission, and all other operational areas.

6. Reports to: (Class Title/Level)

Director, Marketing (exempt)

7. Relationship with Department Director (Select one)

- Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): The CEA will meet weekly with the Executive Director and have multiple weekly meetings with leadership regarding marketing policies/issues.

8. Organizational Level (Select one)

- 1st  2nd  3rd  4th  5th (mega departments only - 17,001+ allocated positions)

## B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Under the direction of the Executive Director and the Director of Marketing, the Deputy Director of Marketing provides executive leadership and policy guidance on a wide range of communication, outreach, research and marketing efforts to ensure Covered California achieves and maintains its individual and small business enrollment goals. The Deputy Director oversees development, implementation and evaluation of marketing efforts, consumer research and programs that advance and support Covered California. The incumbent will work in close collaboration with Covered California's executive team, other state departments, representatives of Federal Government, the Legislature and other related stakeholders. The Deputy Director oversees the division's day-to-day operations and ensures compliance with State and Covered California policies and procedures. Also, the incumbent act;in the absence of the Director of Marketing.

This position will manage the overall marketing activities to reach the diverse California population with emphasis on the Subsidy eligible; provide leadership in the development of marketing strategies to ensure a cohesive and consistent message across all communication platforms including television, radio, out-of-home, social and digital advertising; use marketing messages to change social norms, attitudes and expectations toward a culture of coverage; oversee media planning process for advertising agencies, reviews and approves media plans, advertising budgets and makes recommendations to senior leadership; direct the development of media plans and budgets to support Covered California goals; and review post-buy analysis and make adjustments to ensure agencies continue to meet goals.

The Deputy Director of Marketing will provide leadership, consultation and collaboration with Policy, Communications, Sales, External Affairs and Operations Divisions to provide policies, procedures and research systems to expand and monitor awareness, increase access and the provision of services that promote sustainability.

Three things are needed to ensure the success and sustainability of the Exchange- quality participating health plans, marketing and outreach to support acquisition and retention of enrollees, and an infrastructure to process applications and payments. The Deputy Director of Marketing will develop strategic goals incorporated within the Strategic Marketing Plan to facilitate the Exchange meeting its overall goals and objects. The incumbent will advise the Executive Director and Senior Leadership on marketing and related research policies necessary to ensure sustainability and enrollee satisfaction. The Deputy Director will represent the Exchange and liaison with other state, federal and local governmental entities including the Department of Health Care Services, the Governor's Office and the Legislature and with business and healthcare 9rganizations.

The incumbent will also collaborate and share lessons learned with health plans to maximize marketing campaign effectiveness while minimizing costs. He/she must also coordinate, collaborate,calibrate and develop metrics to be able to quantify the impact of marketing on the call centers and other services channels to maximize service and staffing levels.

**B. SUMMARY OF REQUEST (continued)**

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- Program is directly related to department's primary mission and is critical to achieving the department's goals.
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: As mentioned above, Marketing is the most visible outward facing component of Covered California, and serves to coordinate consistent, uniform and accurate information regarding all Covered California activities. Its responsibility for messaging and marketing assets has a profound effect on the primary mission, other operational areas as well as the ability to achieve sustainability. To be sustainable, Covered California must enroll millions of previously uninsured Californians and maintain those that have already enrolled. Marketing will have primary responsibility for impacting the awareness and attitudes about Covered California and educating all target populations about the importance of being insured.

## **B. SUMMARY OF REQUEST (continued)**

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

Health Care reform has been a very complex and controversial issue at the national level for many years. To address this matter, the Patient Protection and Affordable Care Act (PPACA) was signed into law on March 23, 2010. In the Fall of 2010, California enacted the first state law in the nation establishing the California Health Benefit Exchange (Covered California) pursuant to the federal Act.

The enabling legislation established Covered California as an independent public entity governed by a five-member board. Covered California is California's health insurance purchasing pool for small business and individuals. The enabling statute imposes requirements on participating and non-participating health plans and insurers. It also requires an integrated enrollment system that provides seamless coverage to impacted program participants of other state administered health coverage programs (Healthy Families, Medi-Cal, Access for Infants and Mothers, etc.). The unprecedented legislative, regulatory, policy and program development work needed to fully establish Covered California and to continue its successful operation demands intensive, high level, policy and program development in all areas, particularly marketing. Marketing is the key to increasing outreach to achieve the goal of providing health coverage for over 4 million Californians at full implementation in 2016.

While Covered California has made significant progress in these areas, it is still in its infancy and many program areas continue to grow based on lessons learned in the first two open enrollments and as our programs continue to grow & evolve. Marketing's role, as well as the need for policy development, is expanding both locally and at the national level in the areas of advertising, consumer research, communication, messaging and customer service via satisfaction surveys, social media campaigns and collaborative communications with external partners (such as use of our materials and co-branding). Therefore, it is necessary to enhance Covered California's overall media capacity, expertise, educational abilities and technical assistance capabilities to:

- Ensure that campaigns developed for both the individual and the small business markets are culturally and linguistically appropriate.
- Reach California's diverse populations.
- Result in higher awareness and understanding of health insurance.
- Maintain coverage and increase enrollment.
- Enhance the enrollment process.

The policy level management structure in Marketing also needs to be augmented to provide both for a Director, primarily responsible for the outward facing policy issues, and a Deputy who will not only relieve the Director of day-to-day management and policy development in technical and administrative areas, but also to oversee development and implementation of research methodology and data collection for:

- Qualitative/quantitative consumer and marketing research projects including multiple, complex market research and tracking studies.
- Ensuring vertical and horizontal integration of research findings.
- Advancing and streamlining business practices.
- Enhancing efficiency and efficacy of communications efforts.

### C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The Deputy Director is responsible for developing:

1) Policy level strategic goals, objectives, time lines and commitment of :resources involved with the Strategic Marketing Plan that addresses:

- Gaps in the individual and small business health insurance marketplace and potential approaches and solutions for Covered California.
- Strategies designed to reach target audiences that addresses California's diverse demographics, including the selection of media vehicles and selection criteria that are founded in creative concept testing, results, research and analytics.
- Strategy on the creation of culturally competent marketing and media materials.
- Strategies for selection criteria (based on ROI, cost efficiency, participation and impressions), compensation and implementation.

2) Policy regarding selection of strategic marketing activities to accomplish the strategic plan including:

- Methods and venues to inform potential customers of Covered California's programs, benefits evaluation, and implementation of non-traditional means of advertising.
- Policy regulating marketing materials to clarifying the benefits of coverage and ensure factual accuracy, integrity and cultural appropriateness.
- Strategies for measurement of the effect of marketing on enrollment and retention and corresponding adjustments to marketing strategies and plans commensurate with changes in these areas.

3) Research Policy decisions to evaluate demographic trends and to determine the most effective research methods for evaluating consumer behavior and development of marketing strategies, including secondary research involving the use of information developed by others and primary research to be conducted by the Exchange; includes:

- Researching consumer behavior to identify how all Covered California program elements and marketing campaigns and strategies, can more effectively reach the consumer and accomplish the basic mission of providing health care coverage for all Californians.
- Understanding the psychology of how consumers think, feel, reason and select between different alternatives (brands, co-pay vrs premium, etc.) includes qualitative and quantitative studies, such as those evaluating consumer's experiences and recommendations for changes in Covered California's consumer journey.
- Evaluating how the consumer is influenced by his or her environment, culture, family, and/or media.
- Researching limitations in consumer knowledge or information that influences decisions and marketing outcome.
- Using internal and external resources to develop media assets to be used as promotions, advertisements and educational materials to benefit the members and customers of Covered California.

4) Budget management policies such as:

- Policy regarding annual budget development which is quite substantial! as the Marketing Division's \$70 million budget represents 31% of the entire operating budget.
- Policy covering the allocation of marketing dollars to activities, exclusively benefiting Covered California and the people of California, to ensure no dollars are misappropriated or used to support political positions, politicians, their views or conflicts with the goals and objectives of Covered California.
- Program expenditure policy decisions to ensure operation within budgetary restraints.

**C. ROLE IN POLICY INFLUENCE (continued)**

**13. What is the CEA position's scope and nature of decision-making authority?**

The Deputy Director of Marketing will have full program responsibility for major technical marketing, research and administrative issues, including associated policy and contract implications. He/she will oversee evaluation of marketing efforts, consumer research and programs that advance and support Covered California. The incumbent will work in close collaboration with Covered California's executive team, other state departments, representatives of Federal Government, the Legislature and other related stakeholders. The Deputy Director will oversee the division's internal and administrative operations and ensure compliance with State and Covered California policies and procedures.

Additionally, the Deputy Director will act for the Director of Marketing in her absence to quickly respond to inquiries and requests from the Governor's Office, the Legislature, associated State and Federal entities as well as Health Plan CEO's and other high-level stakeholders and partners.

**14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?**

As described above, the position will take lead in developing new policies, as Covered California is a new, evolving and developing organization. As such, policy development must be responsive to lessons learned in the initial and ongoing implementation of our programs as well as research regarding customer satisfaction and evolving marketing forums (ie. social media). Even after our programs are more stable, marketing policies will continue to evolve based on lessons learned and new strategic goals for not only ensuring access to quality health plans, but also maintaining and increasing enrollment.