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# TOOLKIT



# ENGAGING THE BUSINESS COMMUNITY

# <u>covering kids</u>™ &families

# Toolkit

# **Engaging the Business Community** A Guide to Business Outreach

Covering Kids & Families<sup>™</sup> is a National Program of the Robert Wood Johnson Foundation

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# Introduction

This section of the *Covering Kids & Families* Engaging the Business Community toolkit contains basic information about business outreach, how to use the toolkit and the additional support available from the *Covering Kids & Families* Communications Team.

<u>Why Engage in Business Outreach?</u> – This section highlights the benefits of working with the business community. Such partnerships can reinforce and complement your outreach efforts by providing new avenues to communicate the availability of low-cost and free children's health care coverage to employees, customers and communities.

<u>How to Use the *Covering Kids & Families* Engaging the Business Community Toolkit</u> – This section outlines how to most effectively use this toolkit by using a 9-step approach to engage businesses in your outreach efforts.

<u>Support Available from the Covering Kids & Families Communications Team</u> – The Communications Team has many resources to help you, including additional toolkits, guides, videos and other outreach materials that you can order or download from the Covering Kids & Families Web site.

# Why Engage in Business Outreach?

More than 8 million children in the United States are uninsured. Most are eligible for low-cost or free health care coverage through Medicaid or the State Children's Health Insurance Program (SCHIP). Unfortunately, many parents whose uninsured children qualify for Medicaid or SCHIP may not know that they are likely eligible for these uninsured programs. This misperception is especially prevalent among households where parents work. Working with the business community can help you reach many of these families. Whether it's a neighborhood store or a nationwide franchise, a business can reinforce and complement your outreach efforts by providing new avenues to communicate the availability of low-cost and free children's health care coverage to employees, customers and communities.

By building relationships with your business community, you can:

- Raise community awareness about the issue of uninsured children
- Access new communication channels and resources to reach eligible families with an important health care coverage message
- Increase the visibility and profile of your organization and the important outreach work being done in your community
- Foster new relationships

## How to Use the *Covering Kids & Families* Engaging the Business Community Toolkit

The *Covering Kids & Families* Engaging the Business Community toolkit is a resource to help you mobilize businesses to participate in Medicaid and SCHIP outreach efforts. For many, getting started can be the hardest part. This toolkit gives you a jump start with a 9-step outreach process to engaging the business community, templates, resources and tips. Every outreach program is unique, so we encourage you to tailor the steps and templates to fit your business outreach needs.

Building successful business relationships requires time, persistence, creativity and enthusiasm. This guide will help you make your program and its health care coverage messages attractive to the business community. It highlights the importance of business involvement in outreach *and* demonstrates how a company can benefit from participation.

Take advantage of the many template materials in the <u>Business Template Materials</u> section to conduct your outreach efforts. Remember to fill in the pertinent information in brackets [XX] within the templates so they are specific to the business you are approaching, including the appropriate name and contact information, the specific "asks" for the business and the local health care coverage program name and contact information.

If you have questions about this toolkit or your business outreach efforts, contact the *Covering Kids & Families* Communications Team at (202) 338-7227 or *coveringkidsandfamilies@gmmb.com*.

# Support Available from the *Covering Kids & Families* Communications Team

This toolkit is one part of the *Covering Kids & Families* campaign to connect eligible, uninsured children to low-cost and free health care coverage programs. A wide array of communications materials are available to order or download on the *Covering Kids & Families* Web site at **www.coveringkidsandfamilies.org**, such as:

#### Covering Kids & Families Toolkits and Guides

- Back-to-School Campaign Action Kit
- Engaging the Business Community Toolkit
- Evaluating Communications and Outreach Guide
- Guide to Placing Public Service Announcements
- Guide to Working with the Faith Community
- Interfaith Toolkit
- Meeting the Match: A Guide to Fundraising
- Message Strategy Toolkit
- Reaching American Indian and Alaska Native Families Toolkit
- Reaching Latino Families Toolkit
- Cover the Uninsured Week Health and Enrollment Fair Planning Guide
- Cover the Uninsured Week State Guides to Finding Health Insurance Coverage

#### Covering Kids & Families Outreach Materials

- Children's Health Coverage Bookmark
- Children's Health Coverage Flier
- Children's Health Coverage Lapel Sticker
- Children's Health Coverage Poster
- Online Photo Library

#### Covering Kids & Families Videos and Public Service Announcements

- Accomplishments Video
- Back-to-School 2005 Spanish Language Music Video
- Outreach Videos (available in English and Spanish)
- Public Service Announcements

#### Reports

- Communications Strategies for SCHIP and Medicaid Retention
- Reaching Uninsured Parents: Insights About Enrolling Uninsured, Low-Income Parents in Medicaid and SCHIP
- Addressing the Barriers to *Covering Kids & Families*: A Values-Based Strategic Framework Research Report
- Retention Literature Review: Retaining Eligible Children in SCHIP and Medicaid

For more information about this toolkit or for more tips on conducting business outreach, contact the *Covering Kids & Families* Communications Team by phone at (202) 338-7227 or via e-mail at *coveringkidsandfamilies@gmmb.com*.

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# Resources

There are many resources available to assist you in your business outreach efforts. This section includes resources that can help you approach businesses, including talking points about *Covering Kids & Families*, fact sheets on children's health care coverage and businesses, and helpful information and Web sites on health care coverage for unemployed or dislocated workers. Additional resources for conducting outreach are available to order or download from the *Covering Kids & Families* Web site at www.coveringkidsandfamilies.org.

<u>Publications and Web Sites</u> – These resources may be helpful in your business outreach efforts. The publications can be found at your local public library, magazine stand or bookstore, or can be requested directly from the publisher.

<u>Fact Sheet (Businesses and Health Care Coverage)</u> – Use these facts and figures when you approach companies to demonstrate to business leaders that their involvement is essential.

<u>Fact Sheet (Children's Health Care Coverage)</u> – These facts on children's health and health care coverage are useful in talking to potential business partners about the importance of promoting the availability of low-cost and free health care coverage.

<u>Covering Kids & Families Talking Points</u> – These basic talking points about Covering Kids & Families will help you in talking to businesses about the campaign and the importance of their participation as a partner.

<u>Customized Outreach Materials</u> – By providing your business partners with attractive, researchbased templates for outreach materials, you can save them time and money and ensure that the correct health care coverage message reaches your target audience.

<u>Health Care Coverage for Dislocated Workers</u> – Company downsizing, plant closings and restructuring can leave many workers unemployed and uninsured. This section provides information about resources available to newly unemployed or dislocated workers. This information is also useful in understanding the important role that businesses play in providing health care coverage.

#### **Publications and Web Sites**

The following publications and Web sites may be helpful in your business outreach efforts. The publications can be found at your local public library, magazine stand or bookstore, or can be requested directly from the publisher. Most of these Web sites and publications are accessible to all readers, free of charge. The resources listed with an asterisk (\*) provide some information at no cost, but require a registration fee to view all of their content.

#### Name

#### **Internet Address**

#### Publications and Web sites for business information

BusinessWeek*	www.b
Chronicle of Philanthropy*	www.p
Forbes	www.fo
Hoover's Online: The Business Network*	www.h
IEG Sponsorship Report*	www.sp
The New York Times*	www.n
The Wall Street Journal*	www.w
Yahoo! (Business & Economy on Yahoo's Home Page)	www.ya

#### ousinessweek.com ohila<u>nthropy.com</u> orbes.com noovers.com ponsorship.com ytimes.com vsj.com ahoo.com

#### Organizations relevant to business interests

Employee Benefit Research Institute
Families and Work Institute
Families USA
HispanicBusiness.com
National Black Chamber of Commerce
U.S. Chamber of Commerce
U.S. Hispanic Chamber of Commerce
Business Interface, Inc. (formerly Welfare to Work
Partnership)

www.ebri.org www.familiesandwork.org www.familiesusa.org www.hispanicbusiness.com www.nationalbcc.org www.uschamber.com www.ushcc.com www.businessinterfaceinc.com

#### Organizations relevant to children's health care issues

Alliance for Health Reform	www.allhealth.org
American Academy of Pediatrics	www.aap.org
Center on Budget and Policy Priorities	www.cbpp.org
Children's Defense Fund	www.childrensdefense.
Covering Kids & Families	www.coveringkidsandf
National Governors Association Center on Best Practices	www.nga.org/center
National Immigration Law Center	www.nilc.org
The Urban Institute	www.urban.org

#### **Industry associations**

National Association of Chain Drug Stores National Restaurant Association National Retail Federation

e.org families.org

www.nacds.org www.restaurant.org www.nrf.com

# Government offices for policy, statistics and information

Centers for Medicare & Medicaid Services (CMS, Formerly the Health Care Financing Administration) FedStats Immigration and Naturalization Service Insure Kids Now! U.S. Agency for Healthcare Research and Quality U.S. Census Bureau U.S. Department of Education U.S. Department of Education U.S. Department of Labor, Employment & Training Administration (dislocated workers information) U.S. Maternal and Child Health Bureau

#### Foundations

Robert Wood Johnson Foundation Annie E. Casey Foundation The Commonwealth Fund Kaiser Family Foundation www.cms.gov

www.fedstats.gov www.uscis.gov www.insurekidsnow.gov www.ahrq.gov www.census.gov www.ed.gov www.doleta.gov

www.mchb.hrsa.gov

www.rwjf.org www.aecf.org www.cmwf.org www.kff.org



# **Fact Sheet**

#### **Businesses and Health Care Coverage**

The following statistics can be used when you reach out to companies. Facts and figures help prove to business leaders that their involvement is essential.

#### Large Companies

Most large companies (those with more than 50 employees) offer employee health benefits. However, this does not mean that all employees are eligible for coverage or that the coverage is affordable. When approaching large companies, you should be sensitive to this distinction. Consider that in 2005:

- 93 percent of firms with 50-199 workers offered health benefits<sup>1</sup>
- 98 percent of firms with 200 or more workers offered health benefits<sup>2</sup>

#### **Small Businesses**

Small businesses (those with 50 or fewer employees) are less likely than large businesses to offer health insurance to their employees. Consider that in 2005:

- 47 percent of firms with three to nine workers offered health benefits<sup>3</sup>
- 72 percent of firms with 10-24 workers offered health benefits<sup>4</sup>
- 87 percent of firms with 25-49 workers offered health benefits<sup>5</sup>

#### **Uninsured Children Can Affect Business**

- Parents of uninsured children are seven times more likely not to fill or delay filling prescriptions than parents of insured kids (14% and 2%, respectively).<sup>6</sup>
- Nearly 70 percent of parents whose children do not have health care coverage say they worry frequently or almost all the time about whether they will have the money to pay for medical bills if their kids are sick or injured.<sup>7</sup>

#### **Companies Do Well By Doing Good**

- Eight in 10 Americans say that corporate support of causes wins their trust in that company.<sup>8</sup>
- Eighty-six percent of Americans are likely to switch to brands or retailers that are associated with a social cause when price and quality are equal.<sup>9</sup>
- Seventy-four percent of Americans say that a commitment to social issues is important when deciding which products and services to recommend to other people.<sup>10</sup>

#### **Working Families**

• In 2002, more than eight in 10 uninsured Americans were in working families. Nearly 70 percent of the uninsured were in families with one or more full-time workers.<sup>11</sup>

<sup>&</sup>lt;sup>1</sup> The Kaiser Family Foundation and Health Research and Educational Trust, "Employer Health Benefits," 2005 Annual Survey.

<sup>&</sup>lt;sup>2</sup> Ibid.

<sup>&</sup>lt;sup>3</sup> Ibid. <sup>4</sup> Ibid.

<sup>&</sup>lt;sup>5</sup> Ibid.

<sup>&</sup>lt;sup>6</sup> Wirthlin Worldwide, National Public Opinion Survey of Families with Children Who Qualify for SCHIP and Medicaid Programs. June 5-26, 2001.

 <sup>&</sup>lt;sup>7</sup> Ibid.
<sup>8</sup> Cone Inc, *The 2004 Cone Corporate Citizenship Study*.

<sup>&</sup>lt;sup>9</sup> Ibid. <sup>10</sup> Ibid.

<sup>&</sup>lt;sup>11</sup> Kaiser Commission on Medicaid and the Uninsured. "The Uninsured: A Primer, Key Facts About Americans Without Health Insurance." (December 2003). www.kff.org/uninsured/loader.cfm?url=/commonspot/security/getfile.cfm&PageID=29345

- People who work for the smallest businesses are the least likely to get health care coverage from their employer. Thirty-five percent of smaller businesses (three to 199 workers) did not offer health benefits to their employees in 2003.<sup>12</sup>
- Workers from low-income families have less access to job-based insurance. In 2001, 50 percent of workers from low-income families did not have employer-sponsored insurance available to them either through their own job or that of a family member.<sup>13</sup>

**Note:** These statistics are current as of January 2006. Check for updated statistics on the *Covering Kids & Families* Web site at <u>www.coveringkidsandfamilies.org</u>.

<sup>&</sup>lt;sup>15</sup> Kaiser Commission on Medicaid and the Uninsured. "The Uninsured: A Primer." (as cited in www.kff.org/uninsured/loader.cfm?url=/commonspot/security/getfile.cfm&PageID=29345)



 <sup>&</sup>lt;sup>12</sup> Kaiser Family Foundation and Health Research and Education Trust. *Employer Health Benefits 2003 Annual Survey*. Pub. No. 3369. (September 2003).
<u>www.kff.org/insurance/ehbs2003-1-set.cfm</u>
<sup>13</sup> Kaiser Commission on Medicaid and the Uninsured. "The Uninsured: A Primer." (as cited in

# **Fact Sheet**

#### **Children's Health Care Coverage**

#### There are nearly **8.3 million** uninsured children in the United States.<sup>14</sup> Many are eligible for low-cost or free health care coverage through Medicaid or SCHIP.

- There are 1.7 million uninsured Hispanic children in the United States. One out of every five Hispanic children under age 18 lacks health insurance.<sup>15</sup>
- While one-third (32.7%) of all uninsured children are Hispanic, Hispanics comprise only 18.9 percent of the nation's population of children.<sup>16</sup>
- There are more than 1 million uninsured African-American children in the United States. Nearly one out of every seven African-American children under age 18 lacks health insurance.<sup>17</sup>
- One-fifth (19.7 percent) of all uninsured children under age 18 are African American.<sup>18</sup>
- While African Americans and Hispanics make up less than 36 percent of the population, more than half of uninsured children are Latino or African American.<sup>19</sup>

#### Uninsured Children Are at Risk

- Uninsured children are less likely to receive proper medical care for childhood illnesses such as sore throats, earaches and asthma.<sup>20</sup>
- Only 45.5 percent of uninsured children received one or more well-child visits in the past year, compared with more than 70 percent of privately or publicly insured children.<sup>2</sup>
- Nearly half (48%) of all uninsured children have not had a well-child visit in the past vear.<sup>22</sup>
- Uninsured children are more likely than insured children to have an unmet or delayed medical need, with one in six (17%) uninsured children having a delayed or unmet medical need in the past year.<sup>23</sup>
- Uninsured children are nine times more likely than insured children to lack a regular source of medical care, such as a pediatrician or family doctor.<sup>24</sup>
- Many uninsured children lack access to basic health care services and sometimes rely on hospital emergency rooms for routine care.<sup>25</sup>
- Among low-income uninsured children whose family income makes it likely that they are eligible for coverage through Medicaid or SCHIP, half (52%) have not had a well-child visit in the past year and almost one-third (31%) do not have a usual source of care.<sup>26</sup>

**Note:** These statistics are current as of January 2006. Check for updated statistics on the Covering Kids & Families Web site at www.coveringkidsandfamilies.org.

ww.acponline.org/uninsured/lack-paper.pdf

<sup>&</sup>lt;sup>14</sup> The United States Bureau of the Census. Current Population Survey, "Income, Poverty, and Health Insurance Coverage in the United States: 2004." (August 2005). http://www.census.gov/prod/2005pubs/p60-229.pdf <sup>15</sup> Ibid.

<sup>&</sup>lt;sup>16</sup> Ibid.

<sup>17</sup> Ibid. 18 Ibid.

<sup>19</sup> Ibid.

<sup>&</sup>lt;sup>20</sup> American College of Physicians – American Society of Internal Medicine. "No Health Insurance? It's Enough to Make You Sick!" (2000).

www.acponline.org/uninsured/lack-paper.pdi 21 Leighton Ku and Sashi Nimalendran. Center on Budget and Policy Priorities. Improving Children's Health. A Chartbook About the Roles of Medicaid and SCHIP. (January 2004). www.cbpp.org/1-15-04health.pdf

An Urban Institute Analysis of The Center for Disease Control's 2002 National Health Interview Survey. (August 2004). www.coveringkidsandfamilies.org/press/docs/2004UrbanFindings.pdf 23 Ibid.

<sup>24</sup> Ibid.

<sup>&</sup>lt;sup>25</sup> Ibid.

<sup>&</sup>lt;sup>26</sup> Ibid.

# **Covering Kids & Families Talking Points**

Companies need to know about your organization and your cause. The following facts can be used in your documents, telephone calls and presentations to help describe *Covering Kids & Families*.

- *Covering Kids & Families* is a national initiative working to connect eligible, uninsured children and families to low-cost and free health care coverage programs available in every state and the District of Columbia.
- *Covering Kids & Families* helps states inform parents of eligible, uninsured children about Medicaid and the State Children's Health Insurance Program (SCHIP).
- *Covering Kids & Families* works with health professionals, educators, businesses, public officials, social service agencies and faith-based organizations to enroll eligible children and families.
- *Covering Kids & Families* community efforts are supported by a national communications campaign that includes local and national media events, national business and organizational partnerships, and community outreach activities.
- During the annual Back-to-School Campaign, *Covering Kids & Families* coalitions, corporations and national organizations organize outreach events throughout the country to urge parents of eligible, uninsured children to put enrolling them in Medicaid or SCHIP at the top of their back-to-school checklist.
- *Covering Kids & Families* is a national program directed by the Southern Institute on Children and Families and supported by the Robert Wood Johnson Foundation, the largest philanthropy in the country dedicated solely to improving the health and health care of all Americans.



# **Customized Outreach Materials**

An important benefit you can provide business partners is access to outreach materials that can be customized. By providing attractive, research-based templates for outreach materials, you can save a company time and money and ensure that the correct health care coverage message reaches your target audience. Larger companies often have in-house printing capabilities and may be willing to cover the production cost of outreach materials that include their logo.

The following *Covering Kids & Families* materials are available as templates and can be customized for businesses. The *Covering Kids & Families* Web site at **www.coveringkidsandfamilies.org** also features a royalty-free photo library, where you can access additional photos to use in promotional outreach materials. The photo library includes images of children of diverse ages and ethnic and racial backgrounds. If you or one of your business partners needs assistance tailoring a template, please contact the *Covering Kids & Families* Communications Team at (202) 338-7227 or <u>coveringkidsandfamilies@gmmb.com</u>.

#### Covering Kids & Families Flier

Fliers are a terrific tool for companies to use to reach their customers. Fliers can be displayed in point-of-sale (POS) areas, such as checkout lines or a pharmacy window; included in shopping or grocery bags; or handed out to customers as they enter and exit an office or store. The *Covering Kids & Families* flier is available in English and Spanish. Companies can include a logo and/or special message in the white box on the back of the flier.

**Example:** Giant Food customized English and Spanish fliers with the company logo and a message of support. The fliers were placed in a special flier holder attached to posters that Giant produced for the 2005 Back-to-School Campaign. The posters and fliers were displayed in 180 Giant stores across four states and the District of Columbia.



R LOW-COST OR FREE

**PARENTS:** .. PROTECT YOUR KIDS

overage programs for uninsured children o II ages in every state. fillions of uninsured children are eligible. .nd children with one or two parents orking – even full-time – may now qualify.

KIDS-NOV G

#### Covering Kids & Families Mail Insert

A colorful mailing insert is an easy way to capture attention when enclosed in a billing statement or paycheck. Mailing insert templates are available in English and Spanish.

**Example:** South Carolina *Covering Kids* customized a mailing insert with its state program information. A utility company included the insert in a monthly billing statement that reached 89,000 customers in Charleston.





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#### **Covering Kids & Families Posters**

Posters can be used to reach customers and employees in stores, restaurants, offices and break rooms. Poster templates are available in English and Spanish.

**Example:** Super Giant customized English and Spanish posters and displayed them along with fliers in 180 stores in four states and the District of Columbia for the 2005 Back-to-School Campaign.

#### Covering Kids & Families Public Service Announcements

*Covering Kids & Families* public service announcements (PSAs) are available in the following formats: broadcast (TV and radio), print and Web site banner. A business partner may be willing to place a print PSA in a store circular, post a banner on its Web site or play an audio PSA over its store public address system. A company may also be willing to provide paid TV time or newspaper print space for a PSA.

**Example:** Albertsons ran a *Covering Kids & Families* PSA in its store circulars during March 2002, reaching an estimated audience of 65 million customers.

**Example:** ARROW Pharmacy & Nutrition Centers placed a PSA on the inside back cover of its quarterly health magazine, Your Guide for Better Health. The PSA included the Connecticut and Massachusetts Medicaid/SCHIP program logos and toll-free numbers. The guide was circulated to 70,000 ARROW customers, pharmacists and physicians.

**Example:** Shell Oil Company agreed to broadcast a 15-second PSA in 21 Connecticut Shell gas stations in August 2002, reaching an estimated 1.5 million customers.







Conversed for:
Doctor Visits
Hospitalization
Prescriptions
Other Benefits





# Health Care Coverage for Dislocated Workers\*

Company downsizing, plant closings and restructuring can leave many workers unemployed. Although federal and state programs can assist newly unemployed or dislocated workers under certain conditions, the worker will face a loss of income and may lose employment benefits, such as health care coverage. As a health care coverage outreach worker, it is important to understand the process and laws related to health care coverage for dislocated workers and their dependents.

# **Important Facts**

- The Employment Retirement Income Security Act (ERISA) of 1974 affords rights to workers and their families to help them manage during a change of employment.
- In each state, rapid response services are provided to workers affected by large plant closings or layoffs. State Dislocated Worker Units provide information through the One-Stop System about education and training options, job search assistance, and, in some states, information about pension and health coverage options.

# **Keeping Health Care Coverage**

- The Consolidated Omnibus Budget Reconciliation Act (COBRA), a 1985 amendment to ERISA, allows employees who lose their jobs or have their hours reduced to purchase extended health care coverage benefits.
- Under COBRA, a dislocated worker can purchase extended health care coverage, including health care coverage for dependents, for up to 18 months from the day health care coverage is terminated.
- The dislocated worker must pay the entire premium while receiving health care coverage under the COBRA provision. While the entire premium may be expensive, the dislocated worker pays the *group rate* premium, which is usually less expensive than an individual rate premium.
- Certain provisions must be met before a dislocated worker qualifies for COBRA:
  - The worker must have lost employment as the result of termination for reasons other than "gross misconduct."
  - The employer must have employed at least 20 workers for half of the previous year's business days.
  - The dislocated employee must have been enrolled in the company's health care coverage plan.
  - The company must still continue its health plan. This means that dislocated workers from a factory that remains open can receive health care coverage under COBRA. If a factory closes completely, then workers are ineligible to exercise their rights under COBRA because the health plan would also cease to exist.



### Get the Word Out

Company relocation and downsizing affects many workers and their children. Dislocated workers between jobs may wish to enroll their children in a low-cost or free health care coverage program.

- Business outreach can include approaching companies that are going out of business. The children of dislocated workers from small businesses and large companies can benefit by their parents' knowledge of Medicaid and SCHIP in what could be a difficult family situation.
- Contact your State Dislocated Worker Unit to determine if information about Medicaid and SCHIP from your state's health department is provided to parents of eligible children.

For information about dislocated workers and links to dislocated worker programs in your state, visit the Web site of the U.S. Department of Labor, Employment & Training Administration at **www.doleta.gov**.

\* Dislocated worker information was compiled from the United States Department of Labor Web site at <u>www.dol.gov/dol/compliance/comp-warn.htm</u>.

# **9** Steps to Engaging the Business Community

This section includes nine easy steps to reaching out to the business community and engaging them in your efforts to connect eligible, uninsured children and families to low-cost and free health care coverage. This step-by-step approach will help you plan your overall strategy, understand how businesses work, identify what businesses you should reach out to, develop contacts, build partnerships and work with the media.

<u>Step 1: Getting Started</u> – As you develop your business recruitment strategy, it is important to review your plans from a business perspective. The principles outlined in this step will help you *think like a business owner* as you develop your strategy.

<u>Step 2: Your Plan</u> – This step will help you to determine your business outreach goals and identify resources in advance to help you focus on the best business outreach opportunities.

<u>Step 3: Knowing Your Audience</u> – The audience you want to reach with your health care coverage message can also be an important incentive to attract business involvement. This step will help you identify your target audiences that will be of interest to the business community.

<u>Step 4: Targeting Businesses</u> – This step will help you prepare your business prospect list by conducting company research.

<u>Step 5: Preparing Your Approach</u> – Once you have identified the companies you want to recruit, you will need to think about the best recruiting approach for each company. This step outlines two main strategies for approaching companies and provides potential outreach activities.

<u>Step 6: Making Contact</u> – The most important step in the business recruiting process is to find the best person to approach at a company. This step provides helpful tips on getting a foot in the door, which is often the hardest part of business recruitment and a script to help you begin your calls to prospective businesses.

<u>Step 7: Following Up</u> – It is important to follow up with your contacts after each interaction. This step provides tips on how to successfully engage companies in outreach efforts by following up and keeping in touch with your contacts.

<u>Step 8: Building Business Relationships</u> – Every company can play a role in reaching families with important health care coverage information. However, not every company you work with will evolve into a long-term relationship. This step provides useful tips for approaching business recruiting and how to prioritize your relationship-building time.

<u>Step 9: Working with the Media</u> – This step serves as a guide to conducting outreach specifically to the business press. It builds on what you already know about media outreach and gives you the information and tools necessary to be successful in working with business reporters and media outlets.

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# **Step 1: Getting Started**

#### **How Businesses Think**

As you develop your business recruitment strategy, it is important to review your plans from a business perspective. You do not need to have a business background or degree to do this. The principles outlined in this section will help you *think like a business owner* as you develop your strategy.

- Every company is unique. Each company has its own distinct decision-making process and cycle. There are many factors that companies will take into consideration before agreeing to work with you. The most common include alignment with a company's needs, mission, products or services; costs associated with a company's involvement; ease of implementation; timing; and the benefits of involvement.
- **Companies are results oriented**. The business community is driven to reach annual goals and sets benchmarks to measure progress, just like your organization. Use this to your advantage by emphasizing how the company's involvement can help your organization achieve its goals.
- Low-cost and free health care coverage is not top of mind. Outside of the health care industry, you will find that the majority of companies do not know that low-cost or free health care coverage is available for most uninsured children. Approach each conversation as an opportunity to educate the business community about the issue and your state's health care coverage programs.
- **Time is money (Part I).** Use your business recruiting time wisely. Focus on communicating a few core points: who you are, what you want, what a company will receive in return and timing. Do not overload companies with too many details about your program and too many materials. If they want more information, they will ask for it.
- **Time is money (Part II).** The business world moves quickly. Although it may take a while to recruit some companies, once they are on board and you have their attention, things can move very quickly. If a company needs information or materials, be prepared to respond quickly. This is especially important in the early stage of your relationship.
- **Business has its own language**. When speaking with business people, use terms and phrases that will resonate with them and be aware of industry terminology. For example, the *official* industry term for restaurants such as McDonald's, Burger King and Wendy's is *quick service*, not *fast food*. Similarly, many retailers such as T.J. Maxx and Wal-Mart refer to their employees as *associates*. A list of common business terms is provided in the <u>Glossary of Business Terms</u> section.



#### How to Approach Business Recruitment

Your approach to business recruitment and relationship building is important. As you begin, it will be helpful to keep the following points in mind:

- **Business recruitment takes time**. It is not unusual to call and exchange information for months before a company gives you a definitive answer. Your patience and persistence will pay off.
- You are presenting an OPPORTUNITY. Conducting health care coverage outreach is not part of most business plans. It will be up to you to "sell the opportunity" to the business community.
- **Passion and commitment sell**. Be enthusiastic about your program and the opportunity to work with the business community. Your passion and commitment will help recruit companies.
- **Relationships count—a lot**. The most successful and long-term partnerships are the ones that are built over time and involve a real relationship between the partnering organizations. Focus on building relationships with the companies you recruit.
- **Start small, think big**. It is OK to start small. This can apply either to the *number of companies* you recruit or the *type of outreach* you suggest for a company to implement. Think of each outreach activity as a first step in a relationship that has the potential to grow over time. The hardest part of business recruitment is getting companies to take that first step.
- **Do not take "no" personally**. When you begin your business recruitment, expect to hear "no." Each company has its own priorities for the year. Sometimes children's health care coverage will fit into its business plan, and sometimes it will not.



# **Step 2: Your Plan**

Like every outreach effort, successful business recruitment begins with a look inward at your organization. It is important to examine your organization's goals and resources to determine the most efficient and effective way to incorporate business outreach into your plans. This step will help you determine your business outreach goals and identify resources in advance to help you stay focused and target only the best business outreach opportunities.

- **Goal setting**. Set realistic and manageable goals and keep in mind what you want to accomplish. Look at business outreach in the context of your overall outreach goals for the year. Do you want to recruit a particular business sector or a specific industry? How can business outreach complement your other outreach efforts? How will you measure and evaluate your success?
- **Resource allocation**. Be willing to commit staff and time. It takes dedicated staff to recruit companies and time to develop, implement and reinforce the relationships. You may need additional financial resources for business outreach materials, so you should determine your available resources *before* you move forward with your business recruiting efforts.
- **Benefits inventory**. Conduct an inventory of the benefits that your organization can offer companies in return for their participation. Examples include media visibility, recognition in materials, an opportunity to speak or be recognized at a media event, volunteer opportunities for company employees, template materials for easy outreach activity implementation, and events that attract potential customers. A benefits worksheet is included in this section to help you create your inventory.

#### Review your list of activities and consider the following:

- Is there a role for a business partner to sponsor an event or outreach activity? Companies are usually interested in opportunities that will raise their profile in the community. Review all of your organization's plans for the year to see if there are opportunities for a company to host or sponsor an activity or event.
- **Should you offer exclusivity?** Exclusivity—the opportunity to be the only company sponsoring an event or activity—is a benefit you can offer if appropriate. A company may also request exclusivity, so be prepared with an answer. Companies are always interested in ways they can distinguish themselves from their competition.
- Will your organization allow its name and logo to be used by a company? Remember that your organization's name, logo and reputation have value. Be sure to list "use of program name and logo" as one of the benefits you can offer companies.
- Can you use a company location as a venue for one of your events or activities? For example, you may want to kick off your Back-to-School Campaign at a local retail store. There are numerous benefits you can offer a retail store for hosting an event, including media visibility, recognition in media and promotional materials, attracting potential customers to

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the store, a speaking opportunity at the event, employee volunteer opportunities, and opportunities to provide store coupons or other giveaway items to attendees.

- Can you provide a company any of the following opportunities at events or activities during the year?
  - **Sampling opportunities**. Companies are often interested in distributing product samples at fairs, festivals and other gatherings.
  - **Demonstration/display opportunities**. Many companies desire booth space at events that provide visibility and opportunities to talk to potential customers.
  - **Distribution of coupons and giveaways**. Companies are often interested in handing out coupons or giveaway items as incentives to attract families.
- What type of signage or other recognition opportunities can you offer a company? Most companies place a high value on visible recognition at events, including banners, signage throughout the event site, and a logo or company name on T-shirts, hats or other promotional materials.
- Are there VIPs or celebrities associated with your organization? Companies are often interested in activities that provide opportunities to mingle with local officials, sports figures or other celebrities.
- Can a company include business promotional materials in a mailing? A company may be interested in announcing something like a new store opening by inserting information in one of your organization's mailings.
- Are there volunteer opportunities you can offer a company's employees? Building an employee volunteer opportunity into your work with a company can be a helpful, and often overlooked, benefit to both parties.

Keep thinking creatively about your work and where there may be points of interest to the business community. Your conversations with prospective companies will also yield additional ideas.

# **Benefits Worksheet**

The purpose of this worksheet is to help you develop a list of benefits to offer to potential business partners based on their interest level and the extent of their involvement. By identifying the benefits of working with your organization before approaching potential business partners, you will be able to make a stronger case for their participation and respond quickly and confidently to their inquiries about the benefits associated with their involvement.

**Basic benefits**. Indicate which of the following benefits your organization could provide companies for their participation in outreach efforts.

- \_\_\_\_ Invitation to event(s)
- \_\_\_\_ Opportunity to speak at a media or other event
- \_\_\_\_ Opportunity to host an event at their place of business
- \_\_\_\_ Signage at a media or other event
- \_\_\_\_ Inclusion in a press advisory/press release
- \_\_\_\_ Inclusion in business and/or general media outreach
- \_\_\_\_ Company quote in press release or other promotional materials
- \_\_\_\_ Recognition on your Web site
- \_\_\_\_ Recognition in a newsletter
- \_\_\_\_ Recognition in a listserv or membership mailing
- \_\_\_\_ Certificate of appreciation or other recognition piece
- \_\_\_\_ Other: \_\_\_\_\_

Additional benefit opportunities. Make a list of any activities, events (e.g., health fairs, festivals, immunization drives, Back-to-School Campaign events, etc.) or products (e.g., promotional fliers, posters, giveaways) your organization produces or is involved in.

1.	7.
2.	8.
3.	9.
4.	10.
5.	11.
6.	12.

Once you have created your list, review the questions listed in the <u>Step 2: Your Plan</u> section to help determine additional benefits you may have to offer companies. *Remember that it is not necessary to offer every company every benefit available.* 

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# **Step 3: Knowing Your Audience**

The audience you want to reach with your health care coverage message can also be an important incentive to attract business involvement. Companies may be more interested in working with you if they know that your target audience is in alignment with their customer base and/or employees. This section will help you identify the characteristics of your target audience that will be of interest to the business community.

### **Your Target Audience**

Your target audience is most likely composed of the parents or guardians of eligible, uninsured children. This audience can be broken into different groups, each with its own unique characteristics (e.g., families, new parents, parents with teenagers). Think about a typical day in the life of one of these groups—where they work or go to school, how they get to work or school, where they shop, where they eat—and create a simple audience profile. The purpose of this profile is to help you describe the different interests and characteristics (demographics and psychographics\*) of your target audience to potential business partners. This information will also help you identify companies that interact with these groups regularly and should be added to your recruitment list. *An audience profile worksheet is available in this section.* 

The following Internet resources can provide you with research statistics:

#### • Ameristat – <u>www.ameristat.org</u>

This Web site provides summaries—in graphics and text—of the demographic characteristics of the U.S. population. Trends on income/poverty, mortality, fertility, migration, foreign-born residents, labor/employment, race/ethnicity and more are highlighted on this site.

#### • State Child Care Profiles – <u>www.nccic.org/statepro.html</u>

These profiles include demographic information about children, families and child care in each state, as well as contact information for different state agencies involved in child care. The profiles also contain links to additional state and national resources.

#### • U.S. Census Bureau – <u>www.census.gov</u>

The U.S. Census Bureau is the preeminent collector and provider of timely, relevant, quality data about the people and economy of the United States.

#### • U.S. Department of Labor – <u>www.dol.gov</u>

The Department of Labor Web site provides information on employment and unemployment data, dislocated workers, employee benefit laws, living conditions and much more.

\* Definitions of frequently used terms are available in the <u>Glossary of Business Terms</u> section.



# **Audience Profile Worksheet**

The purpose of creating an audience profile is to help you describe your target audience to potential business partners. By thinking of your target audience as consumers and employees and understanding more about their day-to-day lives, you can strategically target companies that interact with various segments of your target audience and make a stronger case for business involvement in your outreach efforts.

First, think about the different groups (segments) that make up your target audience (e.g., parents, families and employees). The following worksheet will help you identify the general interests and characteristics of each group.

Take one of the groups and develop a general audience profile for that group by completing the following questions:

Group:	Age range:	Incom	e range:
Occupation(s):			
Ethnicities:			
Full-time:	Part-time: Temporary:	Seasonal:	Student:
How do they ge	et to work or school?		
	s do they watch? What radio stations	-	
Which newspay	pers or magazines do they read?		
	ccess to the Internet? At home, school		

What type of music do they like?

Where do they go out to eat?

Where do they shop for groceries and clothes?

Where do they do their banking?

What languages do they speak?

Where do they live? What communities or geographic regions are they from?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Where do their children go to school?

Other special characteristics:

Repeat this exercise for different groups within your target audience.

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# **Step 4: Targeting Businesses**

Now that you have identified your business outreach goals, conducted an inventory of the benefits you can offer business partners and created audience profiles, it is time to prepare your business prospect list. A company profile worksheet is included in this section to help guide your company research.

#### **Creating Your List**

Creating a business prospect list involves more than just writing down a list of companies on paper. It involves carefully evaluating the companies you put on your list to ensure that your recruiting time and resources are used wisely. Consider the following criteria as you prepare your list. A company does not need to meet each criterion to be on the list, but it should meet most of them.

- Will the company help you reach your outreach goals? Review your goals for the year and make sure that the companies you are targeting will help you reach those goals. Be sure to think through *all* of the ways that the business community can help your outreach efforts. Think beyond asking companies to communicate health care coverage information to customers and employees. There may be other tangible ways a company can help.
- Are the company's products and/or services geared toward the same audiences your organization wants to reach? Companies will be more interested in working with you if they know that the families you want to reach are also their customers.
- Does the company employ a large percentage of people whose children may be eligible? This criterion is important if the focus of your business outreach is employees. However, this information may be difficult to ascertain, since many companies are proprietary about their employee benefit information. You can make an educated guess for the purpose of creating your business prospect list.
- Does the company have a history of community involvement, especially in the areas of children, families or health? Companies that are active in the community are usually receptive to listening to new ideas and opportunities for involvement.
- **Does the company have a good reputation?** Avoid associating your program with a company that is generating negative press or one that has an unfavorable reputation in the community. You should also avoid companies whose products (e.g., tobacco) or services contradict the healthy life you are striving to provide for children.

# Additional factors to consider when preparing your business recruitment list include:

• **Current economic conditions**.\* A downturn in the economy, company downsizing, plant closings and restructuring may affect the type and number of companies on your recruitment list. The same can be said for favorable market conditions, low

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unemployment rates and increased consumer confidence. Be sure to consider current economic factors when creating your list.

- **Business associations**. Business associations (e.g., chambers of commerce, Rotary Clubs, restaurant and other trade associations) are often an overlooked yet valuable outreach vehicle. An association can assist your business outreach efforts in a number of ways, including:
  - Disseminating information to its members
  - Lending credibility to Medicaid and SCHIP outreach
  - Providing contact information
- Media Companies. Television, radio and print publication companies provide another excellent, yet often overlooked, partnership opportunity. In addition to asking media companies to provide free advertising, place public service announcements or match a paid media buy with free placements, you could ask them to:
  - Provide talent (e.g., a newscaster, talk show host, disc jockey, columnist) to serve as a host for a media event or other outreach activity
  - Conduct special on-site event promotions
  - Serve as a media adviser to your organization
  - Introduce Covering Kids & Families to their advertisers

\* Many business contacts will be familiar with the Consolidated Omnibus Budget Reconciliation Act (COBRA), and they may ask you questions about the program and how it relates to Medicaid or SCHIP. Information on COBRA can be found in the <u>Resources</u> section.

#### **Size of the Business**

The size of a business can influence whether it would be a good partner for your outreach efforts. For the purpose of *Covering Kids & Families* business outreach, large companies are those with more than 50 employees and small companies are those with 50 or fewer employees. This section outlines things to consider when reaching out to large and small businesses to determine whether they will be a good fit.

#### Large Companies

When considering large companies, it will be helpful to note the following:

- Large companies may have more human and financial resources to invest in outreach activities than small companies.
- Large companies may have one central office to disseminate information throughout the organization for maximum outreach efficiency.
- Large companies may be decentralized and allow individual departments or local offices to determine policies and procedures related to community involvement activities.

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- Large companies may have community relations or public affairs departments that are willing to assist with media outreach support.
- Large companies may be interested in outreach to customers and employees.

Examples of large companies, by industry, include:

- Family Entertainment: Blockbuster, Six Flags, King's Dominion
- Financial: Bank of America, H&R Block, Charles Schwab
- Grocery: Albertsons, Kroger, Giant, H-E-B, Safeway
- Hotel: Best Western, Motel 6, Ramada
- Media: NBC, Univision, ABC, Urban Radio Networks, Parenting, Washington Post
- Retail: Kmart, Payless ShoeSource, Target
- Pharmacy: CVS, Eckerd, Rite Aid, Walgreens

#### **Small Businesses**

When considering small businesses, it will be helpful to note the following:

- Small businesses have fewer human and financial resources than larger companies. A small business may not have extra staff to devote to coordinating an outreach effort or resources to produce outreach materials.
- Outreach to small businesses can be more labor intensive, since it may involve calling or meeting with businesses one on one to encourage their participation.
- Small businesses may be more interested in employee outreach than customer outreach.
- Small businesses include:
  - Beauty and nail salons
  - Independent restaurants, retail stores and other independent businesses
  - Local media outlets (e.g., community newspapers, local radio stations)
  - Neighborhood grocery stores/bodegas
  - Franchise stores\*

\*A franchise is an independently owned and operated company. The franchisee (owner) purchases the company brand from the parent company and agrees to keep the products and services at a set standard. For example, Subway is a corporate-owned store and franchise store. It is important to note this distinction because a franchise store can make charitable giving and community involvement decisions independently from its parent corporation. For example, if Subway Restaurants works with Covering Kids & Families on outreach efforts nationwide, this does not mean that every Subway in the country will participate. Franchise owners will normally decide independently whether or not to participate. To find out if your business prospect is a corporate-owned or franchise store, you should inquire with the store owner or manager.

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**Note:** For statistics about businesses that provide health care coverage for their employees according to the size of the business, see the Fact Sheet on Businesses and Health Care Coverage in the <u>Resources</u> section.

#### **Company Research**

Once you have created your prospect list, it is important to conduct research on the companies you want to approach. The depth of your research will vary based on the company and the type of outreach activity you want it to conduct. At a minimum, you should visit each company's Web site.

If a small business does not have a Web site, you can check with your local Small Business Administration, chamber of commerce, or Better Business Bureau to see if information on the company is available. The more you know about a company, the better you will be able to evaluate its potential as a partner and prepare your recruiting approach. A company profile worksheet is provided in this section. This worksheet can serve as a guide for the type of company information you should collect.

The most common sources for company information include:

- Company Web sites
- Annual and financial reports
- Business publications and business sections of local newspapers
- Business information Web sites\*\*

\*\* Business information Web sites are listed in the <u>Resources</u> section.



# **Company Profile Worksheet**

The following worksheet will help you create a company profile. It is not necessary to answer every question on the worksheet before approaching a company. Use the questions as a guide for gathering information and adjust the questions to fit the needs of your business outreach efforts.

Company/Association:		_
Contact:(For a list of the suggested compan	y contacts to approach, see <u>Step 6: Making Contact</u> ).	_
Title:	Department:	
Address:		
Phone:	Fax:	
E-mail:	Web site:	
Headquarters location:		
Secretary/assistant name:		
Is there a parent company or	subsidiaries?	
What are the company brands 12.	/products/services?	
5		
Who is the company's target	audience? Is it brand/product/service specific?	
Product	Target audience	

How many retail outlets/stores does the company have? Are retail outlets/stores company owned, franchised, both?

How many employees (e.g., full-time, part-time, seasonal) does the company have? Are employees union affiliated?

Does the company advertise? If so, where (e.g., TV, radio, print, direct mail, Internet)?

Is the company launching any new initiatives? Does it plan to roll out a new product or start a marketing campaign? *Note: You can normally find out this information by reading company press releases posted on the company Web site.* 

Is the company currently involved in the community? Does it sponsor charity events or have special programs that address social issues (e.g., hunger, health, education, illiteracy)? If yes, how does it promote these activities?

Has the company ever been involved in a health-related event/activity (e.g., immunization campaign, local health fair)?

Who are the company's competitors? What types of community activities are its competitors involved in?

Has the company received any negative media attention in the past six months?

What is the company's approval process and time frame for decision making?

Does anyone in your network have a contact at the company?

Is there any additional information of interest?


# **Step 5: Preparing Your Approach**

Once you have identified the companies you want to recruit, you will need to think about the best recruiting approach for each company. This section outlines two main strategies for approaching companies and provides potential outreach activities.

## **Different Strategies for Business Outreach**

There are two types of strategies in which your business partners can partake: *external* and *internal. External* outreach is when a company communicates health care coverage information *externally* to its customers and the community. *Internal* outreach is when a company communicates health care coverage information *internally* to its employees. It is important to make a distinction between the two because (1) the audiences are different; (2) many of the outreach activities are different; and (3) the benefits to a company are different. Your recruiting strategy for each company will depend on whether that company is interested in conducting one or both types of outreach. The following highlights key elements and activities for each strategy.

# **External Outreach**

Audience: The audiences for external outreach include a company's customers, its vendors and the community at large.

Activities: The activities for this type of outreach are very public and have the potential to reach a large audience.

**Benefits:** The benefits of external outreach can include public recognition of the company and the opportunity to reach new customers.

#### **Outreach Ideas:**

- **Consumer newsletter**. A company can place an article about the importance of children's health care coverage and the availability of low-cost and free programs in its consumer newsletter.
- Flier distribution. A company can distribute health care coverage information fliers to customers. This outreach option will be more attractive to a company if it is tied to a specific time period or special promotion. You may want to ask the company to produce the fliers as part of its outreach commitment. A flier template is available for companies to customize with their logos. (See the <u>Resources</u> section for a sample customized flier.)
- **Point-of-purchase displays**. When promotional materials are displayed at cash registers, pickup windows or checkout counters, consumers are being reached at their "point of purchase." Program signage, tear-off coupons, brochures and fliers in "take one" holders are the most common point-of-purchase materials that companies display.
- **On-premise events**. On-premise events, also called in-store events, are appealing because they can attract customers to the store and can be used as a backdrop for a media event to raise awareness about children's health care coverage.
- Web site and Internet promotion. Company Web sites often have a special section to highlight the work the company does in the community. You can link your site to a

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company site or ask the company to run a banner ad or include a health care coverage message in e-mails to its online audience.

- **Back-to-School Campaign**. The *Covering Kids & Families* Back-to-School Campaign is an excellent opportunity to involve a company in local outreach efforts with the added benefit of being part of a nationwide effort. The back-to-school theme is an easy link for many retailers and family-friendly companies.
- **Capitalize on existing corporate activities**. Many companies sponsor festivals, sporting events, and activities that benefit children or the places they frequent, such as schools or parks. You may be able to "piggyback" on these events and provide health care coverage information to attendees.
- **Product packaging and promotional materials.** A company may be willing to add a health care coverage message and your state toll-free hotline number to product packaging (e.g., toothpaste boxes, movie theater or sporting event tickets, tray liners in quick-service restaurants). Keep in mind that companies plan their product lines and production schedules well in advance, so it may take a year or more for this tactic to come to fruition.
- **Corporate advertising**. Most companies spend money on advertising (e.g., print, radio and TV). A company may be willing to use its advertising dollars to help promote a health care coverage message and your state's program. For example:
  - **Print**. A company that buys regular ad space in your local newspaper may be willing to include a health care coverage message and the hotline number in its advertisement. Or, the company might provide space in its in-store circular for a print PSA.
  - **Radio**. A company may be willing to sponsor a radio message for your state program or provide free (public service) ad time for your organization as part of its regular ad buy.
  - TV. A company can ask the TV stations with which it does business to provide airtime for a PSA. For more information on PSAs, please visit the *Covering Kids & Families* Web site at <u>www.coveringkidsandfamilies.org</u> to download the *Covering Kids & Families* Guide to Placing Public Service Announcements.\*
  - **In-store advertising**. Many companies have video monitors and public address systems that can run public service announcements for your state program.

\* **Note:** Public service announcements (print and television) and public service announcement scripts for radio are available through the *Covering Kids & Families* Communications Team at GMMB. Call (202) 338-7227 or e-mail *coveringkidsandfamilies@gmmb.com* for more information.

### **Internal Outreach**

Audience: The audience for internal outreach is a company's employees or the members of a chamber of commerce, business association or trade association.

Activities: Internal outreach activities take place within a company and are not visible to the general public (e.g., paycheck inserts or posters in break rooms).

**Benefits:** The benefits to companies for internal outreach do not usually involve public recognition and often are not tangible (e.g., employees feel more loyalty to a company because the company informed them about available health care coverage for their children).

#### **Outreach Ideas:**

- **Paycheck inserts**. A company can distribute a health care coverage message in employee paychecks. A sample of a customized paycheck insert is available in the <u>Resources</u> section.
- **Posters and fliers**. Posters promoting available low-cost and free health care coverage for children can be displayed in employee break rooms. Companies can also place fliers in break rooms or in employee welcome information packets. Customized poster and flier samples are available in the <u>Resources</u> section.
- **Employee newsletter**. A company can include an article on the importance of health care coverage and information about available low-cost and free health care coverage programs for children in its employee newsletter. An employee newsletter template is available in the <u>Business Template Materials</u> section.
- **Employee Health Fair Day**. Many companies sponsor employee health fairs. A company may be willing to provide you with booth space at no cost.

#### **Tips:**

- Companies are interested in participating in outreach activities that are easy to implement. Companies will factor in the time and resources that will be needed before agreeing to participate. Be sure to stress the availability of templates and materials, especially if they can be customized to include a company's logo.
- Do not immediately offer to provide outreach materials to a company for free. Companies may be willing to pay for the production and distribution of promotional materials. Larger companies often have in-house printing and distribution systems in place. If you provide the template, many companies will handle the production and distribution.
- A good way to present different outreach activities to a company is to provide a menu of options. It is not necessary to include *every* outreach option. In fact, such a list may be overwhelming for the company.



# **Step 6: Making Contact**

The most important step in the business recruiting process is to find the best person to approach at a company. Getting a foot in the door is often the hardest part of business recruitment. You should expect to make more than one phone call to a company to reach the best contact.

## **Getting a Foot in the Door**

The best place to start your search for a company contact is your network of colleagues, friends and family. Once you have your business recruitment list, ask people in your organization and network if they know anyone at any of the companies on your list. Personal contacts are invaluable because they can help you navigate through a company's layers to find the most appropriate contact person. You may find that someone in your network is a close friend of the company contact you need to reach.

If you are unable to find a contact through your personal or professional network, start with a company's community relations department. Community relations staff members understand the media potential and goodwill that community involvement can bring to a company. For smaller businesses, the owner or general manager is usually the best person to contact. However, every company is different, so any of the following contacts may be your first point of entry:

- **Community Relations** Responsible for a company's community involvement activities
- **Corporate Relations** Responsible for business-to-business relationships and corporate sponsorships
- **Public Relations** Responsible for handling a company's external communication; often the same as community relations
- Human Resources Responsible for employee benefits
- **Owner (smaller businesses)** Responsible for running the business
- General Manager (smaller businesses) Responsible for day-to-day operations



## **Preparation and Practice**

After you assemble recruiting information, it is important to think through and practice your approach before contacting a company. Preparation and practice tips include:

- List your core message points on paper. These are the most important points that you want to emphasize with a prospective company:
  - **Statistics**. Use the statistics that will be most compelling to a particular company. For example, if you are reaching out to a Hispanic-owned business, include Latino health care coverage statistics.
  - **Income eligibility**. Use a dollar figure instead of the percentage above the federal poverty level (FPL) (i.e., a family of four making up to \$38,000 a year may be eligible).
  - **Low-cost or free**. Explain the differences in your state, if applicable.
  - **Coverage benefits**. Indicate the benefits that are covered by your state program (e.g., health care provider visits, prescriptions, hospitalization, vision care, dental care).
  - **No cost to businesses**. This is very important to clarify with prospective business partners.
- **Create additional "pitch" points**. Your pitch points are the persuasive reasons you present to a company to encourage its participation.
  - Event/activity description, if applicable. For example, a Back-to-School Campaign event would be attractive to many companies. Be prepared to describe your event plans and how a company could participate. For more information on planning a Back-to-School Campaign event, please visit the *Covering Kids & Families* Web site at <u>www.coveringkidsandfamilies.org</u> to download a copy of the *Covering Kids & Families* Back-to-School Campaign Action Kit.
  - **Examples of events and activities**. Share examples of outreach activities that may be of interest to a company. Your company contact will be better able to visualize the company's involvement if they have a clear understanding of the different types of outreach activities taking place. But be careful not to highlight events sponsored by the company's competition. For example, if you did a successful promotion with Target, you may not want to use this as an example if you are approaching Kmart. For examples of successful *Covering Kids & Families* state outreach activities, see the <u>Promising Strategies</u> section.
  - **Results and highlights**. Tell your contact about the results of previous outreach activities. Share statistics about the amount of media coverage garnered, as well as the number of people who participated, hotline calls made and applications distributed.

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- **Special connection points**. Look for special points of connection between a company and children's health care coverage. For example, if a company you approach is interested in education issues, you may highlight the research on how health care coverage impacts school attendance and readiness to learn. Explain how a company's involvement in Back-to-School Campaign outreach activities can complement its existing commitment to education by making sure kids are healthy and ready to learn.
- **Practice your pitch points out loud**. The more comfortable and natural you sound in a conversation or meeting, the easier it will be to interest a company in working with you on outreach efforts. The process will become easier the more often you do it. After each business conversation or meeting, take a minute to think about the points that resonated the most and the questions asked and adjust your pitch accordingly.

### **Contacting Businesses**

Once you have identified a contact person and given thought to your approach, you are ready to start recruiting. You can approach a company by phone, by letter or in person, or use a combination of all three. It is necessary to take your staff resources into consideration to determine the best approach for your organization.

**By phone**. Contacting a company by phone is the fastest recruiting method. It may take a few calls to find the right contact, but once you have found that person, the process can move quickly. A sample phone script is available in this section. Phone tips include:

- Schedule a time for a phone call with your contact. Scheduling a time to talk with your company contact not only helps you prepare but shows them that you respect their time. Recruiting calls last from five to 10 minutes, on average, depending on the interest the contact shows and the questions they ask.
- **Be prepared**. Have your core program and recruiting points in front of you when you make your calls. The points will help you stay focused.
- **Practice the message you will leave on voice mail if the contact is not available**. Speak clearly, keep the message brief, and leave your name and phone number *at the beginning of the message* so the recipient does not need to listen through the entire message a second time to retrieve your contact information.
- Use a conversational tone and show your enthusiasm. Do not read directly from your core points. Explain your program briefly in simple terms. You can fill in details later. You should also convey your excitement about the opportunity to work with the company you are calling. Smile when you are talking—it will make your contact more inclined to listen.

**By mail**. A letter is the most traditional form of business contact. Template letters are available in the <u>Business Template Materials</u> section. A letter allows you to think carefully about the messages you want to convey to a prospective partner. However, companies are inundated with paper, so it is important to follow up on your letter. Tips for writing business outreach letters include:

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- **Personalize your letters**. Avoid sending a generic "Dear Business Leader" letter. A generic letter will end up in the recycle bin.
- Keep your initial letter short and concise. Your letter should introduce your contact to your health care coverage program and convey your interest in working with their company on outreach efforts. The letter should be one to two pages.
- Close your letter by letting the reader know when you will follow up. Be proactive in your letters. Do not close a recruiting letter by asking the person to contact you.

**In person.** While you may not have time to meet with every company or association on your list, attempt to meet with your top choices. A face-to-face meeting is one of the most effective ways to focus a company's attention on children's health care coverage and the need for and benefits of its participation in outreach efforts. Meeting tips include:

- **Confirm your meetings.** Call the day before or the morning of the meeting to confirm the meeting time. Double-check who will be attending so you can bring the appropriate number of materials.
- **Confirm equipment needs.** If you are planning to show a video, PowerPoint presentation or overhead presentation, confirm that the equipment/power outlets will be available. A template PowerPoint presentation is available for download in the *Covering Kids & Families* Back-to-School Campaign Action Kit at <u>www.coveringkidsandfamilies.org</u>. You can also order outreach videos from the *Covering Kids & Families* Web site or by calling the Communications Team at (202) 338-7227.
- **Begin the meeting with a thank you and your ask**. Begin a meeting by thanking the business representatives for meeting with you and confirming the amount of time they have available for the meeting. It is important that you respect people's time and do not exceed the amount of time allotted to you. Let them know early on what exactly you are asking of them. Discuss several outreach opportunities so they have a choice.
- End the meeting with next steps. End your meeting by summarizing the key points and any next steps that were discussed, and thank the business representatives for their time.
- Leave information behind. Even if you have already sent an information kit, leave behind sample materials with the business representatives.

A note on e-mail. E-mail correspondence is becoming an acceptable method of business communication. However, for business recruiting purposes, a letter is the recommended form of written communication until a relationship with a business contact is established or a contact has indicated a preference for using e-mail. Unsolicited e-mail is even easier to ignore than an unexpected letter.

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# Sample Phone Script

#### I. MAKING THE CONNECTION

- Hi, this is [NAME] with [ORGANIZATION].
- [NAME] gave me your name and suggested I speak with you about a project that [ORGANIZATION] is working on that may be of interest to [COMPANY]. Do you have a few minutes right now to talk?
- Great. Are you familiar with [MEDICAID/SCHIP PROGRAM]?

#### Tips:

- Whenever possible, reference a contact name in your introduction. This includes anyone at the company who may have helped you by providing you with a contact name: "*Beth Smith in the human resources department gave me your name*."
- Make sure your contact has time to talk. If it is not a good time, ask them when you can call back. You may need to push this point: "*Is there a convenient day and time when I can call you back?*" "*Would you like me to call your assistant to set up a call?*" Try to avoid letting them call you back—they rarely do. If they suggest this option, wait a week and then try them again. You do not want to be too pushy, but if they have not called you back within a week it usually means they do not plan to call. You should try one more time. Approach this callback gently: "*I really appreciate your time; I know this is a busy time of year for you.*" You can also ask them if there is someone else in the company with whom you should speak.
- Be prepared to leave a voice-mail message. Remember to leave your name and number at the beginning of the message and keep the message short: "*This is* [NAME] with [ORGANIZATION] at (XXX) XXX-XXXX. (Enunciate the number clearly and slowly; many of us tend to speak too hurriedly on voice recordings.) Beth Smith gave me your name and suggested I speak with you about a project that we're involved in that may be of interest to [COMPANY]. I will try to reach you again later in the day [OR OTHER SPECIFIC TIME]. I look forward to speaking with you soon."

#### II. WHO YOU ARE AND WHAT YOU WANT

• [ORGANIZATION] is working with businesses and organizations in the community on outreach efforts to connect uninsured children to [LOW-COST OR FREE] health care coverage through [*MEDICAID/SCHIP PROGRAM*].

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#### WHO YOU ARE AND WHAT YOU WANT (continued)

- There are [# OF UNINSURED CHILDREN] uninsured kids in [COMMUNITY/STATE]. Most of them are eligible for [*MEDICAID/SCHIP PROGRAM*], but their parents may not know it. A family of four earning up to [\$XX] a year or more may be eligible for [LOW-COST OR FREE] health care coverage for their children. Many working parents assume that because they work, their children are not eligible for [*MEDICAID/SCHIP PROGRAM*].
- Our goal is to reach eligible families and help them enroll their children in [*MEDICAID/SCHIP PROGRAM*]. We would like [COMPANY] to help us! [ADD SOMETHING COMPLIMENTARY ABOUT THE COMPANY, SUCH AS THE GREAT WORK IT HAS DONE WITH ANOTHER GROUP OR ITS SUPPORT OF HEALTH AND/OR CHILDREN AND FAMILY ISSUES/CAUSES].
- In [TIME FRAME/MONTH], [ORGANIZATION] is planning a Back-to-School Campaign outreach and enrollment drive [OR ANOTHER EVENT/ACTIVITY]. We will be kicking off our Back-to-School Campaign on [DATE] with a news conference at [LOCATION]. This event will be followed by a series of outreach activities throughout the month. I'd like to talk to you about ways that [COMPANY] could participate in our Back-to-School Campaign and help us connect more kids to the health care coverage they need.
- For example, [COMPANY] could display outreach posters in its stores during the month of [MONTH] or host an outreach and enrollment event. [PROVIDE A FEW SAMPLE IDEAS THAT ARE APPROPRIATE TO THE COMPANY. SEE THE SAMPLE PROPOSAL IN THE <u>BUSINESS TEMPLATE MATERIALS</u> SECTION FOR MORE OUTREACH IDEAS.]
- Is this something that would be of interest to [COMPANY]?

## Tips:

- Tailor your program description to the person's knowledge. If they are familiar with Medicaid and SCHIP, spend less time on the program description and emphasize the point that many parents do not realize that their children are eligible: "*I'm glad you're familiar with [MEDICAID/SCHIP PROGRAM] and the services it provides.* Our challenge is reaching eligible families that do not know about the program or think their children are not eligible. For example, a family of four earning up to [\$XX] a year or more may be able to get health care coverage for their children. Working families often assume that their children are not eligible."
- Keep your descriptions simple and avoid using terms or acronyms that your contact may not be familiar with, such as the federal poverty level (FPL).

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- Do your homework on the company so that you can highlight a related issue or cause it supports or recognition it received for its work in the community. For example, "[COMPANY]'s commitment to children through its work with the Children's Miracle Network is impressive. It's one of the reasons we think [COMPANY] would be a great partner on outreach efforts to get uninsured children in our community connected to [MEDICAID/SCHIP PROGRAM]."
- Look for the best connecting points with a company. For example, if you are pitching a company that sells school supplies or clothes, connect the importance of health care and readiness to learn with the campaign's goal of putting health care coverage on a family's back-to-school checklist. If you are speaking with a company that has a tie to sports and athletics, mention the *Covering Kids & Families* research finding that relates to sports: "*Did you know that one out of five parents of eligible, uninsured children has kept or would keep their children out of a sporting or athletic event because of fear that they might get injured and have no way of being treated? Your company can help connect these kids to health care coverage so they can participate in sports and athletic events."* For helpful facts and figures, see the <u>Resources section</u>.
- Have two or three outreach ideas ready to share with your contact during your conversation. Providing examples gives your contact tangible ideas for outreach activities and a better sense of how they can participate.
- Don't forget to make "the ask." During this first call, your objective is to find out if your contact is interested in learning more and getting involved, not to confirm a company's participation. Most people will want you to send additional information that they can review before making a decision.

# III. ADDITIONAL POINTS YOU CAN WEAVE INTO A CONVERSATION

- To make your involvement easy to implement, we have fliers and applications that we can provide to each store. [USE SPECIFIC EXAMPLES.]
- We plan to recognize the businesses and organizations that participate in our Back-to-School Campaign in our media materials and at our kick-off event on [DATE]. [SHARE A FEW OTHER SPECIFIC BENEFITS WITH THE COMPANY.]
- [ORGANIZATION] is interested in building a partnership with [COMPANY]. We are different from many other organizations in that we are not seeking sponsorship dollars. Instead, we are interested in exploring how [COMPANY] can use its existing communications channels, such as your company newsletter, Web site or [INCLUDE A FEW EXAMPLES SPECIFIC TO THE COMPANY] to help us reach eligible families with important health care coverage information.

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## Tips:

- Stress the ease of involvement for a company. The easier it is for a company to be involved, the more likely it will agree to participate. Let your contact know if you plan to provide outreach materials. If you want a company to produce its own outreach materials, let your contact know you have template materials that can be customized with the company logo.
- Companies are accustomed to being asked for money. If you are not asking a company for a contribution or a sponsorship fee, let your contact know up front. They will be surprised and happy!
- Pay attention to the flow of the conversation. Be prepared to talk about some of the benefits the company will receive by participating. If your contact does not ask you about the benefits associated with the company's involvement, you may want to weave this information into your conversation. This lets your contact know that you are thinking of the company's interests as well as your own. For example, "In addition to thinking about different outreach ideas on our next call, we can also discuss the benefits of your company's involvement, such as having a banner and signage at the kick-off event and inclusion of your company's name in our media materials."

### **IV. WRAPPING UP THE CALL**

- Thank you for taking time to speak with me today. I'm very excited to explore the possibility of working with [COMPANY].
- Is there anyone else in the company that you would like me to talk to about this project?
- Is there any additional information I can provide?
- When would you like me to follow up with you? Later this week, next week? [TRY TO CONFIRM A DATE AND TIME BEFORE YOU GET OFF THE PHONE.]
- If you have any questions or need further information before our next call, please call or e-mail me. [PROVIDE CONTACT INFORMATION. USE YOUR DIRECT PHONE LINE IF YOU HAVE ONE.]

#### Tips:

- Before you end your call, be sure you have a next step, such as setting a date for your next call, sending program information or setting up a meeting.
- If your contact was made through a friend or colleague, keep them in the loop about your progress.

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# **Step 7: Following Up**

To successfully engage companies in outreach efforts, you will need to follow up. It is important to follow up with your contacts after each interaction. Do not wait for them to initiate the follow-up. Keeping in touch with your contacts and moving the relationship process forward is *your* responsibility.

# **Follow-Up Tips**

- Send a thank you. If you talk to a business contact by phone or meet in person, be sure to send a formal thank you letter along with follow-up materials, if applicable. Other thank you tips include:
  - Send a thank you letter as soon as possible (within two days). The letter can be short. A brief paragraph is appropriate. If the follow-up information will take longer than two days to prepare, send the thank you letter separately and indicate in the letter that additional information will be arriving soon.
  - If you attend a meeting with multiple participants, send a thank you letter with the follow-up materials to your primary contact and short thank you letters to the other meeting attendees.
  - Once a business relationship has been established, handwritten thank you notes or emails are acceptable.
- **Customize follow-up materials**. Use the information that you gathered from your business conversation or meeting to customize follow-up materials. For example, if a company contact expresses an interest in a particular type of outreach activity, be sure to mention the activity in your follow-up materials.
- **Confirm receipt of correspondence and materials**. This is a professional courtesy. You can leave a voice-mail message, send an e-mail, or speak with your contact's assistant to confirm their receipt of items you have sent.
- **Provide a proposal if requested**. Some companies may ask for a written proposal. Be sure to ask if the company has guidelines for proposals. Always keep the document concise (one to three pages). A template Proposal is available in the <u>Business Template Materials</u> section.
- Establish a rapport with your business contact's assistant or secretary. Assistants are often gatekeepers for business leaders. Be sure to learn the name of your business contact's assistant and be cordial when you call. An assistant can help keep your program on the boss' radar screen.

# When a Company Says "Yes"

Confirming a business commitment in writing will provide you with an important reference document.

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- **Confirmation of participation letter**. A confirmation of participation letter can be used for simple outreach efforts (e.g., a company agrees to place an article about your state's program in its employee newsletter). The letter should thank the company for agreeing to participate in outreach efforts and indicate what the company has agreed to do and when the activity will take place. A sample confirmation of participation letter is available in the <u>Business Template Materials</u> section.
- Letter of agreement. For business outreach activities that involve more detail, a letter of agreement is a useful tool. A letter of agreement will help ensure that the agreed-upon activities are properly implemented. The letter should outline each party's commitment, clarify responsibilities and provide a timeline with applicable deadlines. A sample letter of agreement is available in the <u>Business Template Materials</u> section.

## When a Company Says "No"

- **Remember that it is not about you**. A company is saying "no" to your program/project/event—not to you as a person. Most companies have a form letter they send to decline involvement in community events or activities. If you receive a response in person or by phone, you may still receive a form letter. The letter is the official company response to your request.
- **Keep your contact information**. If a company that you would like to work with declines to participate, keep your contact's information on file. There may be an opportunity to approach them in the future. You should consider sending your contact a summary of highlights and results from your outreach activities to pique their interest for the future.
- Look for opportunities to turn a "no" into a "yes." The key to a "no" follow-up conversation is to indicate that you have heard the initial "no" and thank your contact for considering your request *before* exploring other opportunities to work together. Once you acknowledge their answer and thank them for considering your request, you can decide whether or not to gently let the contact know that you would be interested in exploring opportunities to work together at another time, thereby presenting a new chance for company involvement.

# **Step 8: Building Business Relationships**

Every company can play a role in reaching families with important health care coverage information. However, not every company you work with will evolve into a long-term relationship. As you begin to engage companies in outreach activities, you will find that some companies are better suited to your project and more interested in making a long-term commitment to children's health care coverage. Approach business recruiting knowing that these efforts will yield different levels of commitment from companies and prioritize your relationship-building time accordingly.

# **Relationship-Building Tips**

- Keep in regular contact with your business partners. To build long-term business relationships, it is important to think of these relationships as year round. Make sure companies know who from your organization is managing the relationship. Stay informed about companies' marketing and community relations objectives and any new high-level appointments.
- **Build a deep company "bench."** In today's business environment, things can change quickly. Your company contact could be promoted, move to another division or leave the company. It is important to build relationships with more than one person in a company to ensure that the work between you and the company will continue even if your primary contact changes. Keep in mind that you are establishing a relationship with the company, as well as the individual. Both relationships are important.
- **Collect and share results**. Remember that companies are results oriented. Companies will be interested to hear how their outreach activities have helped to increase state hotline calls, application requests and the number of children enrolled in health care coverage programs. Tangible items, such as copies of news clips, are also of interest. When possible, quantify the results (e.g., the number of families attending an outreach event or the circulation of a newspaper that runs a print public service announcement).
- Share family stories. Family stories can demonstrate the importance of business participation and the difference that companies can make in people's lives. For example, telling a drug store chain the story of a parent who learns about available health care coverage at an outreach event at a local store and subsequently enrolls their children is a powerful way to reinforce the importance of the company's participation.
- **Solicit feedback**. In addition to participating in outreach efforts, the business community can serve as a valuable sounding board for new ideas. Soliciting feedback and ideas from your partners will help them feel more invested in working with your organization.
- Further engage businesses in your organization's activities. Consider inviting companies to attend events or asking them to speak about their outreach activities at a meeting or conference.

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- **Recognize your business partners year round**. In addition to the recognition a company receives for its participation in a particular outreach activity, there are other ways to recognize business involvement year round.
  - Incorporate a business outreach "talking point" when speaking publicly about your organization and Medicaid and SCHIP. Use various company examples to provide additional visibility to companies working with you.
  - Include a quote from a company representative in an outreach brochure or other promotional materials.
  - Ask a company representative to serve as a spokesperson within the business community for your local health care coverage program.
  - List participating companies in outreach materials (e.g., a fact sheet) and on your Web site.

Be sure to provide copies of these materials, speeches and news clips to your business partners. For additional ideas, see <u>Step 9: Working with the Media</u>.

- **Strengthen your relationships.** An important part of building a business relationship is getting to know your company contact.
  - Start your calls or meetings with a minute or two of light conversation.
  - Send your company contact a holiday card.
  - Send a handwritten note to your contact if you see an important article about the company in the paper.
  - Send your contact's boss a letter telling them how much you enjoy working with your contact.



# Step 9: Working with the Media

This section serves as a guide to conducting outreach specifically to the business press. It builds on what you already know about media outreach in general and gives you the information and tools necessary to be successful in working with this niche of reporters and media outlets. For more information on media outreach, download the *Covering Kids & Families* Back-to-School Campaign Action Kit at www.coveringkidsandfamilies.org.

### Make the Most of Your Business Partnerships

Your new business partnerships open up many new opportunities for media outreach. From announcing a partnership at a news conference to jointly submitting an op-ed to your local newspaper, there are many ways you can leverage your business partnerships to augment your media outreach efforts. For your new business partners, media coverage can be a particularly critical component of the partnership. Positive exposure in the media is one of the best ways to show a company that its involvement with your organization is valuable to its business.

#### **Objectives**

- Use business partnerships to bring additional media attention to Medicaid and SCHIP.
- Show the benefits of working with your organization by generating positive exposure in the media for your business partners.
- Persuade other companies to join your outreach effort.

#### **A Smooth Partnership**

Most companies have public relations or community relations offices or someone who is in charge of that aspect of the business. When planning an event or media outreach activity with a new business partner, enlist the help of your partner's public relations professionals. By coordinating your media outreach efforts, you will improve your chances of success.

There are a few things to remember when working with your business partners:

- Always cite the company's name according to the company's specifications. Many companies have both a formal name and a name that is used colloquially. Consult your business partner about the correct way to refer to the company both in writing and when speaking.
- Determine who is going to serve as the spokesperson for the company when speaking about the partnership. Confirm the spokesperson's title and the correct spelling of their name.
- Be sure to get a signoff from your business partner on all materials that mention the company name, the spokesperson or the partnership.
- Provide talking points for the company's spokesperson when they speak publicly about the partnership.

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• Keep your business partner informed about the results of your outreach efforts by providing materials and news clippings. Reinforce your relationship with photographs from in-store enrollment events and stories of families that are now enrolled as a result of the company's participation.

## **Develop Your Message**

Before you conduct media outreach related to your business partnerships, it is critical that you determine your message. While connecting uninsured children to low-cost and free health care coverage remains the major component of your message, you will need to explain the importance of your business partnerships and how they will help connect kids to health care coverage.

In addition, it is important to consider the audiences of business news outlets. Beyond the general business audience, the business press also reaches business leaders and opinion leaders in the community. Therefore, speaking to the business press is an indirect way of speaking to an influential group of people whose support for your programs could be critical. Tell your audience why the business community is supporting your outreach efforts and why continued support for these programs is good for the community.

Your messages about business involvement in your outreach efforts should become an integral part of your overall message. Whenever you speak publicly about your program, be sure to mention the involvement of your business partners.

## **Opportunities for Media Coverage**

There are many ways to take advantage of your business partnerships and create opportunities for media coverage. Work with your new business partners to determine what level of involvement they would like to have in both business and general media outreach efforts.

#### Here are some media outreach activities to consider:

- **Issue a press release.** If you do not have the resources to organize a news conference, be sure to issue a press release announcing the partnership. Major partnerships should be announced publicly. A press release formalizes the partnership by putting it in writing and informing the media. Be sure to share draft press releases with business partners. A template News Advisory and Press Release can be found in the <u>Business Template Materials</u> section.
- Submit a joint op-ed to your local newspaper or a drop-in article to a trade publication or newsletter. Instead of holding a news conference, you can announce your partnership via an op-ed or drop-in article in your local newspaper, a trade publication or a business newsletter. You can write a joint op-ed with your business partner, or you can draft one yourself then give it to your partner for approval. A template Op-ed and Drop-in Article can be found in the <u>Business Template Materials</u> section.
- **Organize a press conference to announce your new partnership.** Announcing a new partnership gives you an additional opportunity to speak publicly about low-cost and free health care coverage for children and highlight how outreach efforts are expanding with

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the help of the private sector. There are many things you can do to make the news conference interesting. For instance, hold the event at your business partner's offices or one of its stores and provide the press with a list of the planned outreach activities. If the company has agreed to make fliers available to customers, then show a sample of the flier. If the company has agreed to hold in-store enrollment events, announce the dates. In general, you want to provide as many specifics about the partnership as possible. For more tips on organizing a press conference, download the *Covering Kids and Families* Back-to-School Campaign Action Kit at www.coveringkidsandfamilies.org.

- **Hold a kick-off enrollment event.** If your business partner has agreed to host enrollment events, consider making the first one a kick-off event and inviting the media. Without holding a full-blown news conference, you can have a few speakers make brief remarks to initiate the event and then follow up with one-on-one interviews with the press. Try to have a photographer on hand so you can submit photos to the press. Be sure to promote the event heavily. Since the media will be there, you will want the event to be well attended. For more tips on organizing an enrollment event, download the *Covering Kids and Families* Back-to-School Campaign Action Kit at www.coveringkidsandfamilies.org.
- **Include your business partner in your other media events.** Whenever you are planning a media event, include your business partner. For example, if you are planning a Back-to-School Campaign news conference, work with your business partner on ways it can be involved or recognized.

#### **Media Tools**

The media tools you use to conduct general media outreach are the same ones you use to conduct outreach to the business press. Templates of these tools can be found in the <u>Business</u> <u>Template Materials</u> section. These tools include:

- News advisories. A news advisory is used to inform the media about a scheduled news event. It includes enough information to convince the media to show up at the event but does not reveal the "news" to be announced. It contains necessary details, including a description of the event, where and when it is taking place, and who will be participating. A news advisory is typically e-mailed or faxed to the media three to five days before an event and is then resent the day before the event and again the day of the event. Always follow up with phone calls to the media to encourage them to attend.
- **Press releases**. A press release contains the news you are announcing. It should be distributed to the media at the event. Following the event, it should be widely distributed to the rest of the media on your press list. If you would like to make an announcement without holding a press conference, a press release can serve as the vehicle for your announcement.
- **Drop-in articles**. A drop-in article reads like a news story but is authored by a local leader. It can be sent to local community newspapers, organization and business newsletters, and relevant Web sites. Usually, these types of publications request a lead time of two weeks.
- **Op-eds.** An op-ed contains both news and opinion. It should be sent to the editorial page editor at your local newspaper. Each newspaper determines its own length requirements, but, typically, op-eds are 400 to 500 words in length. Follow up with a phone call to the

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editorial page editor to reinforce your points and the significance of running the op-ed in the newspaper.

• **Talking points**. Talking points should be used by spokespersons so that there is a consistent message. They should be used by your business partners and anyone in your organization who will be speaking to the media or in other public venues. Talking points can also be used when trying to interest a reporter in a story or when conducting an interview.

# **Expand Your Outreach to the Business Press**

Business partnerships give you the opportunity to approach a new set of reporters and media outlets about your partnerships and Medicaid and SCHIP. The first step is to develop a business press list so that you can target reporters and news outlets that cover the business community. The press list should include the following:

- **Business section reporters and editors.** Almost every newspaper has a business section and reporters who cover business issues or general issues as they relate to the business community.
- **Business newspapers' assignment editors and reporters.** Some media markets have newspapers dedicated entirely to business issues.
- **Radio and television business beat reporters.** Many television and radio stations have business beat reporters and devote a section of their daily newscasts to business news.
- **Local trade publication editors.** Trade publications exist for almost every industry and are typically well read by those involved in a particular industry.
- **Business newsletter writers.** Newsletters are regularly published by organizations representing the business community, such as chambers of commerce and Rotary Clubs.

#### Call each media outlet to find the appropriate media contact using the following guide:

- **Newspapers.** Call the newspapers on your current press list and ask for the names of the business editor and the business reporters. If you developed your press list from a media directory, the same directory will list business newspapers. Call and find out if there is a reporter assigned to cover business activities within the community.
- **Radio.** Ask for the business news reporter. If there is no specific person assigned to the business beat, ask for the news director. Ask if the station covers business news and who should be contacted regarding local business news.
- **TV.** As with radio, ask for the business news reporter. If there is no specific person assigned to the business beat, ask for the news director and inquire who should be contacted regarding local business news.
- Local trade publications/business newsletters. If possible, work with your business partners to develop this part of your list. They are likely to be on numerous mailing lists for

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publications and newsletters that you could potentially target. In addition, your local chamber of commerce might be able to provide suggestions on local publications.

• Web sites. Many newspapers also have a presence online and, in many cases, have a separate editorial staff assigned to produce news for the Web site. Call and find out if there is a reporter assigned to cover business news for the Web site. Also, media directories list additional business Web sites with original editorial content. Call these Web sites and ask to speak with a reporter who covers local business news.



# **Promising Strategies**

This section includes several state and local examples of successful relationships that *Covering Kids & Families* coalitions that have developed with their local business communities. In the following descriptions, grantees share their success stories and the lessons they learned in their experiences with various types of businesses. To demonstrate how business relationships are built on a larger scale, four national *Covering Kids & Families* partnerships are also highlighted.

#### State Covering Kids & Families Partnerships

<u>Connecticut</u> - Covering Connecticut's Kids, with the assistance of the national *Covering Kids & Families* Communications Team, built a partnership with ARROW Pharmacy to place information about *HUSKY* health care coverage in shopping bags and post *HUSKY* information in English and Spanish in every ARROW Pharmacy store in Connecticut.

<u>Idaho</u> - Healthy Outcomes for Youth (HOY) teamed up with the Boise Chamber of Commerce to distribute *Idaho CHIP* information to the chamber's 5,200 member companies.

<u>New Mexico</u> - New Mexico *Covering Kids* developed a relationship with the El Paso Electric Company in Doña Ana County to provide detailed information about *New MexiKids* to its customers.

<u>North Carolina</u> - North Carolina Health Choice for Children developed a partnership with Kmart to increase awareness of Medicaid and SCHIP. During its first year, the partnership involved only one Kmart store. In the second year, outreach events expanded to include several stores throughout the state.

<u>Texas</u> - *Covering Kids & Families* in Houston forged a beneficial partnership with ClearChannel Communications, the largest displayer of outdoor advertising in the country. As part of the partnership, ClearChannel Outdoor has donated billboards displaying information about *TexCare*.

#### National Covering Kids & Families Partnerships

<u>Capital One</u> - Capital One, a diversified financial services company, contacted the Robert Wood Johnson Foundation after hearing a *Covering Kids & Families* health care coverage message sponsored by the Foundation on National Public Radio. Capital One has been a corporate partner for three years.

<u>Giant</u> – *Covering Kids & Families* leveraged its relationship with the National Association of Chain Drug Stores (NACDS) to negotiate a partnership with Giant Food, which is a member of the association. Giant has been a corporate partner for five years.

<u>H&R Block</u> - The *Covering Kids & Families* Communications Team built a national partnership with H&R Block, a diversified company with subsidiaries providing a wide range of financial services and products. The partnership involved several different elements, including promotion of the toll-free 1(877) KIDS-NOW number on the company's personalized Just for You financial advice form.

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<u>Major League Soccer (MLS)</u> - *Covering Kids & Families* worked with the Sports Philanthropy Project to facilitate a partnership between *Covering Kids & Families* and Major League Soccer (MLS), which is comprised of 12 professional soccer teams.

<u>2005 Back-to-School Corporate Partners</u> - This section highlights the corporate partnerships for the 2005 Back-to-School Campaign.

For more information on forming partnerships with corporations, contact the *Covering Kids & Families* Communications Team at (202) 338-7227 or via e-mail at <u>coveringkidsandfamilies@gmmb.com.</u>



# State Covering Kids & Families Partnerships

# Connecticut

Covering Connecticut's Kids, with the assistance of the national *Covering Kids & Families* Communications Team, built a partnership with ARROW Pharmacy to place information about *HUSKY* health care coverage in shopping bags and post *HUSKY* information in English and Spanish in every ARROW Pharmacy store in Connecticut. In addition, ARROW ran a full-page public service announcement (PSA) in the ARROW Pharmacy & Nutrition Center's Your Guide for Better Health booklet.

The *Covering Kids & Families* Communications Team set up the partnership with ARROW Pharmacy during the 2001 Back-to-School Campaign. Covering Connecticut's Kids worked with the *Covering Kids & Families* Communications Team via telephone and e-mail to design the PSA, and with ARROW's assistant vice president of retail marketing to finalize the details of its dissemination. Information about *HUSKY* was featured on the inside back cover of the guidebook, which is circulated to an estimated 70,000 physicians, pharmacists and ARROW customers in the state.

With minimal effort, Covering Connecticut's Kids reaped outreach rewards by simply taking advantage of a partnership established by the national *Covering Kids & Families* Communications Team.

Also in Connecticut, customers at Shell gas stations across the state learned about *HUSKY* as they pumped their gas as a result of a partnership formed between Shell and Covering Connecticut's Kids. There are 21 Shell stations in Connecticut that display video advertisements through a television monitor built into every gas pump. Covering Connecticut's Kids contacted the advertising agency that manages the video on behalf of Shell. The agency's contact information was printed on a sticker that was located on each gas pump for inquiries about advertising on the Shell network. After one phone call to the advertising agency, the agency agreed to partner with the coalition in its Back-to-School Campaign by broadcasting a *HUSKY* PSA at Shell gas stations.

The agency needed a 15-second PSA, rather than the original 30-second version that the national *Covering Kids & Families* Communications Team had produced. Within a few weeks, the Connecticut coalition and the national *Covering Kids & Families* Communications Team abbreviated the PSA to 15 seconds. During the 2002 Back-to-School Campaign, the *HUSKY* PSA appeared at Shell gas stations that serve an estimated 1.5 million customers per month.

For more information, please visit the Covering Connecticut's Kids Web site at **www.ctkidslink.org/covering.html**.

# Idaho

Healthy Outcomes for Youth (HOY) teamed up with the Boise Chamber of Commerce to send fliers on *Idaho CHIP* to the chamber's member companies. In addition, fliers promoting a *Covering Kids & Families* Back-to-School Campaign event, where parents could sign up their children during their lunch hour, were sent to 5,200 chamber member businesses to post on their bulletin boards. The Boise Chamber of Commerce also featured an article about *Idaho CHIP* in its newsletter.

To initiate the partnership, HOY contacted the chamber's marketing department. After several discussions with representatives from the chamber, HOY formalized the partnership by creating a customized *Idaho CHIP* Outreach Toolkit specifically for the chamber. The toolkit included a sample application, a brochure and a poster with tear-off sheets. HOY also created a request form to make it easy for companies to request brochures, posters, presentations, applications and other materials by e-mail or fax.

HOY learned some important lessons through this and other partnerships. The most important lesson is that many companies are just not aware of what they can do to help with SCHIP outreach. By offering companies specific examples of ways they can incorporate SCHIP outreach into the work they are already doing, HOY demonstrated to the companies that they can make a real difference with little extra work on their part.

HOY determined that the key to a successful partnership is follow-up. It is important to maintain regular contact with companies and provide them with updated information on the program. Many companies do not have time to become involved in coalition meetings, but they appreciate updates and telephone calls. Follow-up is also a way to determine whether the companies need more materials for distribution.

For more information, please visit the Idaho *Covering Kids & Families* Web site at **www.mtnstatesgroup.org/children.htm**.

## **New Mexico**

New Mexico *Covering Kids* developed a relationship with the El Paso Electric Company in Doña Ana County to provide detailed information about *New MexiKids* to its customers. El Paso Electric was an appropriate match for New Mexico *Covering Kids* due to its unique ability to access almost every household in Doña Ana County every month. This was the first time the company had undertaken a project with a nonprofit organization.

The *Covering Kids* Doña Ana County pilot project manager had an initial meeting with local representatives of El Paso Electric Company in Las Cruces and was referred to the main offices in El Paso, where the point of contact was the public relations officer. Although there were no documents created to formalize the partnership, the project had to be cleared by the El Paso Electric legal department, which took approximately three months.

New Mexico *Covering Kids*, in conjunction with the local Human Services Department, designed a billing statement insert. The electric company covered the production and mailing of the billing insert, which cost approximately \$7,000. The result of this public-private partnership was a two-time mailing to more than 65,000 households.

Overall lessons learned from the partnership were that it is important to ask questions and be persistent, patient and courteous at all times. New Mexico *Covering Kids* thanked the El Paso Electric Company and gave it a beautiful plaque for its commitment to increasing awareness of *New MexiKids*.

For more information, please visit the New Mexico Voices for Children Web site at **www.nmvoices.org**.



# North Carolina

North Carolina Health Choice for Children had a longstanding partnership with Kmart to increase awareness of Medicaid and SCHIP. During its first year, the partnership involved only one Kmart store. In the second year, outreach events expanded to include several stores throughout the state.

The first year of the partnership was very successful, even though it was limited to one store location. Before the partnership began, the North Carolina *Covering Kids & Families* outreach coordinator described the program in detail to the Kmart associates working at the store. The associates showed more enthusiasm and support for the partnership because of this meeting.

During the month of August, North Carolina *Covering Kids & Families* had a display table at the entrance of the store with applications, fliers, and a contest registration for a bike and helmet giveaway at the end of the month. Posters were displayed throughout the store, including near restrooms, water fountains, snack bars, the children's clothing and shoes department, and the school supplies department. The pharmacy mounted a rack to the wall near the prescription pick-up window to display applications with the North Carolina Health Choice for Children flier attached. Members of the pharmacy staff received training about the program and were encouraged to mention the state's low-cost and free programs to parents who expressed difficulty in paying for their children's prescriptions.

As a result of these efforts, 300 families that registered for the bike and helmet giveaway were subsequently checked for existing coverage and mailed another flier with a cover letter thanking them for their interest. In addition, a total of 200 applications were picked up from the pharmacy and the display table during the month-long event.

The first year, no documents were created to formalize the partnership; a verbal agreement was made with the store manager. The second year, North Carolina *Covering Kids & Families* formalized the partnership with the Kmart district manager. Unfortunately, North Carolina *Covering Kids & Families* was not able to address the staff of each store, as a number of new stores joined the partnership. As a result, the level of employee understanding and support of the outreach effort dropped. Kmart agreed to display the North Carolina Health Choice for Children materials throughout the stores and pharmacies, but the enthusiasm was not there because only the managers and pharmacists understood the program and its purpose.

North Carolina *Covering Kids & Families* learned that it is important to attempt to speak to a company's employees directly and describe the partnership to them in detail. Not only will they be more enthusiastic about implementing the partnership, they may also be part of the target audience. North Carolina *Covering Kids & Families* also learned that a full month is too long for an event with an individual store, as there are a lot of logistical concerns when an event runs for such a long period. A week-long event may be a more manageable time frame.

For more information, please visit the North Carolina Health Choice for Children Web site at **www.dhhs.state.nc.us/dma/cpcont.htm**.

# Texas

Over several years, *Covering Kids & Families* in Houston forged a beneficial partnership with Clear Channel Communications, the largest displayer of outdoor advertising in the country. As part of the partnership, Clear Channel Communications donated billboards during the Back-to-School Campaign displaying information about *TexCare*.

The partnership began in 2002, when the *Covering Kids & Families* Houston project received a grant from the Michael & Susan Dell Foundation to further its outreach efforts. The coalition decided to use the funds to purchase billboards from Clear Channel Communications and display them during the Back-to-School Campaign. The first step was to schedule a meeting with representatives from the Clear Channel Communications community relations department.

Clear Channel Communications agreed to match the grant money dollar for dollar. The *Covering Kids & Families* Communications Team worked with the Houston coalition to provide the necessary artwork for the billboards. The billboards, produced in English and Spanish, were displayed around Houston throughout the months of August and September and were seen by an estimated 1 million people each day.

The Houston coalition continued to engage Clear Channel Communications in efforts throughout the year, including inviting Clear Channel Communications representatives to the annual appreciation luncheon for members of the media and sponsoring organizations. The luncheon is an opportunity to thank community members for all they do and to provide updates on the program. By inviting representatives from Clear Channel Communications to the luncheon each year and keeping the lines of communication open, the Houston coalition has kept Clear Channel Communications interested in its outreach efforts and successfully incorporated the organization into the Gulf Coast CHIP coalition.

As of Back-to-School 2005, Clear Channel Communications has donated more than 200 billboards for the Back-to-School Campaign in Texas, including 40 in 2005.

Since the inception of the coalition's relationship with Clear Channel Communications, the Children's Defense Fund of Texas built a relationship with a Harris County judge who was a longtime supporter of *TexCare* and was looking for effective ways to get involved with the coalition to help promote the program. In 2005, his office donated the funds to purchase 23 of the 63 billboards displayed, and printed and installed the billboards donated by Clear Channel Communications.

In 2006, Clear Channel, Judge Eckles and the *Covering Kids & Families* coalition is launching a billboard campaign displaying billboards throughout Texas, in every area where Clear Channel Communications has jurisdiction.

For more information about this project, please visit the *Covering Kids & Families* Web site at **www.coveringkidsandfamilies.org/projects/local.php?LProjectID=116**.

# National Covering Kids & Families Partnerships



### **How It Started**

Capital One, a diversified financial services company based in McLean, VA, contacted the Robert Wood Johnson Foundation after hearing a *Covering Kids & Families* health care coverage message sponsored by the Foundation on National Public Radio.

After Capital One made the initial contact with the Foundation, the process of developing a partnership with *Covering Kids & Families* took two years. At the outset, *Covering Kids & Families* participated in meetings with representatives from multiple divisions of the company to present information about *Covering Kids & Families* and begin discussions about ways to work together. Capital One was also invited to attend a Back-to-School Campaign event to learn about the program and meet other corporate partners. *Covering Kids & Families* provided Capital One with highlights of national and local Back-to-School Campaign outreach activities to demonstrate the success of the program in raising awareness, increasing calls to the toll-free information hotline and requests for applications, and providing recognition to *Covering Kids & Families* partners.

Once on board, Capital One worked with *Covering Kids & Families* to map out an outreach plan. This included the design and distribution of Capital One billing statements featuring a special health care coverage message and the toll-free 1(877) KIDS-NOW number, promotion of *Covering Kids & Families* and the toll-free number on the company Web site, and mention of *Covering Kids & Families* and the importance of health care coverage in its consumer newsletter.

Capital One also promoted its work with *Covering Kids & Families* to its employees through customized posters and banners that were placed in the company headquarters, and in internal communications to let employees know why *Covering Kids & Families* is important and what the company planned to do to support outreach efforts. Further demonstrating its commitment and engagement, Capital One asked the *Covering Kids & Families* Communications Team to produce a video of select event and media highlights from the Back-to-School Campaign launch event to use at internal meetings.

As the partnership grew, *Covering Kids & Families* asked Capital One to speak about the importance of business outreach at a Back-to-School Campaign launch event, which garnered additional media coverage for the company. Other recognition included thank you letters from the Foundation, certificates of appreciation, annual partnership summary reports, and inclusion in a paid recognition ad for all of the *Covering Kids & Families* corporate partners in *USA Today* and Newsweek magazine.

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# What Covering Kids & Families Learned

**Identifying a champion within the company is critical**. The key to the success of this partnership was identifying a champion within the company who believed in the mission of *Covering Kids & Families* and could help navigate through the company internally and build support for its participation.

**Building a successful partnership requires an investment of time and energy.** It took two years of discussions and information-sharing before Capital One came on board as an official corporate partner. Capital One spent time learning about *Covering Kids & Families* and how the company's involvement would be beneficial to the program's mission and its own social responsibility objectives.

**Measurable results are important to companies**. Capital One, along with other corporate partners, wants to know how many children will receive the health care coverage they need because of its outreach efforts. While this impact cannot be measured directly, there are elements of the program that can be measured, such as the number of calls to the national toll-free hotline and the percentage increase in calls from previous years, the number of people who attend a local outreach event, the number of applications that are requested, and so forth. It is important to Capital One to know that it is making a difference, and this information helps generate continued support for the program within the company.



# **How It Started**

*Covering Kids & Families* leveraged its relationship with the National Association of Chain Drug Stores (NACDS) to negotiate a partnership with Giant Food, which is a member of the association. Giant Food, LLC operates 200 Giant Food and Super Giant supermarkets in Maryland, Virginia, Delaware, New Jersey and Washington, DC, and has been a *Covering Kids & Families* partner for five years.

After conducting research on the company, *Covering Kids & Families* made an initial call to Giant's public affairs department, mentioning the connection with NACDS. Following the call, *Covering Kids & Families* sent additional information about the program and the issue of the uninsured, and a letter outlining possible elements of a partnership. After continued follow-up via phone, *Covering Kids & Families* was invited to present information about its Back-to-School Campaign and partnership opportunities to a group of Giant representatives from different departments within the company. The presentation included highlights of past *Covering Kids & Families* Back-to-School Campaign events, media coverage, sample collateral materials and a list of suggested ways to work together.

For Giant, it was important that its participation be something it could promote to customers in its stores and that the activities and materials were easy to implement. *Covering Kids & Families* customized poster and flier templates to include Giant's logo along with the wording "this message is brought to you by your friends at Giant." Giant paid for the production and distribution of the promotional materials as part of the partnership.

In addition to the in-store promotional materials, *Covering Kids & Families* worked with local *Covering Kids & Families* grantees in select communities to organize outreach events at Giant stores as part of their Back-to-School Campaign outreach and enrollment activities. Grantees were selected based on their interest and availability and their proximity to Giant and Super Giant stores.

As Giant's partnership with *Covering Kids & Families* evolved, the company expanded its promotional efforts to include more marketing channels for the *Covering Kids & Families* health care message and the national toll-free 1(877) KIDS-NOW number, including putting the message and hotline number on milk cartons, in consumer newsletters and advertising circulars, and on the company Web site.

Each year, Giant has sent representatives to the Back-to-School Campaign national launch. *Covering Kids & Families* recognizes the company at the launch event, and sends a summary report of event highlights and certificates of appreciation to the Giant representatives. The Robert Wood Johnson Foundation has also recognized Giant and the other *Covering Kids & Families* corporate partners in paid recognition ads (*USA Today* in 2003 and Newsweek in 2005). The recognition ads were extremely well-received by the corporate partners.

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# What Covering Kids & Families Learned

**Good partnerships will continue to evolve.** Each year, Giant and *Covering Kids & Families* has had an assessment conversation about what worked best the previous year and should be continued and what things can be done to improve Giant's outreach effort, including starting its promotion of the toll-free number sooner and adding communication channels to the partnership.

**Keep participation simple.** Giant finds working with *Covering Kids & Families* very easy. The company appreciates that materials can be customized with its logo so that all it needs to do is print and distribute them to stores.

**Recognition is extremely important.** Giant is very involved in communities where it does business. In its stores, the community bulletin boards promote Giant's support of various community projects. Giant hangs its *Covering Kids & Families* certificates of appreciation in its stores to share them with employees and customers. Giant's liaison with *Covering Kids & Families* uses the Back-to-School Campaign highlights book, media highlights and the paid recognition ad to generate continued interest in and support for *Covering Kids & Families* each year.



# **How It Started**

The *Covering Kids & Families* Communications Team built a national partnership with H&R Block. Based in Kansas City, MO, H&R Block is a diversified company with subsidiaries providing a wide range of financial services and products. In 2001, H&R Block served 19.2 million taxpayers through its more than 10,400 offices located in the United States, Canada, Australia and the United Kingdom.

H&R Block rolled out its partnership with *Covering Kids & Families* during the 2002 tax season. The partnership involved several different elements, including promotion of a low-cost and free health care coverage message and the toll-free 1(877) KIDS-NOW number on the company's personalized Just for You financial advice form. Clients with children under the age of 19 who earned \$35,000 per year or less received the special message on their form. In addition, H&R Block tax professionals provided state-specific Medicaid and SCHIP information to interested families and encouraged them to call the toll-free hotline to find out if their children were eligible.

*Covering Kids & Families* was first introduced to H&R Block in June 2000 through a contact at the federal Health Resources and Services Administration (HRSA). H&R Block was already working with HRSA to refer potentially eligible clients to the national toll-free 1(877) KIDS-NOW number. *Covering Kids & Families*, HRSA and H&R Block discussed opportunities for H&R Block to be involved in the inaugural *Covering Kids & Families* Back-to-School Campaign launch, but the timing did not work for H&R Block. *Covering Kids & Families* continued to touch base with H&R Block every few months to keep the program on its radar screen.

In June 2001, *Covering Kids & Families* had a conversation with H&R Block about the second annual Back-to-School Campaign, but reinforced its interest in working with the company any time of the year. *Covering Kids & Families* didn't hear back from H&R Block for a while. Then, in October 2001, H&R Block called, ready to develop a partnership for the 2002 tax season. To move the process forward, *Covering Kids & Families* was invited to attend H&R Block's national conference and set up an information booth.

*Covering Kids & Families* and H&R Block agreed that one of the most important elements of the partnership would be to raise awareness among H&R Block tax professionals about the partnership and Medicaid and SCHIP, since these professionals deal directly with clients. The greater their awareness of Medicaid and SCHIP, the better prepared they would be to answer questions potentially eligible clients might ask.

*Covering Kids & Families* addressed this awareness-raising opportunity in two ways. Nationally, *Covering Kids & Families* worked with H&R Block to include information about the partnership

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and Medicaid and SCHIP in several of the company's internal communication vehicles: News & Views, a newsletter from H&R Block's president of tax services; Block Central, a news and information Internet site for all H&R Block field employees; and H&R Block's broadcast e-mail, which reaches 65,000 tax professionals. On a regional and state level, *Covering Kids & Families* coalitions were invited to make presentations on their state programs at H&R Block leadership conferences during the months of December and January. *Covering Kids & Families* also created a simple state-by-state PowerPoint presentation that H&R Block offices could use if a *Covering Kids & Families* representative was unavailable.

The last component of the partnership was the distribution of state-specific materials. To simplify the distribution process, H&R Block assigned a contact person for each state who would serve as the coordinator for information and materials related to the *Covering Kids & Families* partnership. *Covering Kids & Families* coalitions worked with this contact to coordinate speaking opportunities at conferences and the distribution of state-specific materials.

It took almost a year and a half to secure H&R Block's commitment. The partnership activities began in December 2001/January 2002 so that the conference training could take place before the start of the tax season. The national partnership news release was sent out on February 14, 2002.

# What Covering Kids & Families Learned

**Be patient and flexible.** Your time frame and ideas may not work for a company the first time around. If you want to work with them, go back and ask them again. *Covering Kids & Families* pursued H&R Block for nearly a year and a half.

**Personal and professional contacts can open doors.** *Covering Kids & Families* was able to establish its relationship with H&R Block because it was introduced to the right decision maker through a contact at HRSA.

When you have an opportunity to build employee awareness in your partnership, take it. It will strengthen your outreach efforts and your relationship with the company.





# **How It Started**

In the spring of 2005, *Covering Kids & Families* began working with the Sports Philanthropy Project to facilitate a partnership between *Covering Kids & Families* and Major League Soccer (MLS). MLS, the United States' professional, 12-team soccer league, includes the Chicago Fire, Chivas USA, Colorado Rapids, Columbus Crew, DC United, FC Dallas, Los Angeles Galaxy, New York/New Jersey MetroStars, Real Salt Lake, San Jose Earthquakes, Kansas City Wizards and New England Revolution.

As the partnership with MLS evolved, the *Covering Kids & Families* Communications Team and the Sports Philanthropy Project were in constant contact with individual teams, working directly with the team's community relations director or the executive director of its foundation to plan activities around the back-to-school time period.

The partnership with MLS has been a tremendous success. During the 2005 Back-to-School Campaign, the partnership brought an added value of approximately \$137,000 and generated nationwide media coverage. In addition, MLS outreach activities reached a cumulative audience of more than 255,000 and provided the campaign with a unique opportunity to reach African-American and Latino families.

Ten MLS teams participated in the 2005 Back-to-School Campaign through various activities, including:

- Provided two high-profile sports spokespersons—Freddy Adu and Jaime Moreno of DC United—for the national launch in Washington, DC and the English and Spanish video news releases (VNRs); footage from the VNRs was used to produce a PSA for DC United to air on the stadium Jumbotron
- Secured the participation of several MLS teams at Back-to-School Campaign events around the country
- Promoted the campaign through various communications channels, such as:
  - Aired Covering Kids & Families PSAs on Jumbotrons
  - Made announcements on PA systems
  - Organized outreach and information booths in stadium concourses
  - Included campaign information in team newsletters and on team Web sites
  - Handed out fliers
  - Had mascot participation
- Declared specific game days "Children's Health Care Coverage Day"
- Partnered with local America Scores organizations (children's soccer camps), including DC Scores and Chicago Scores, to bring children to local events

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# What Covering Kids & Families Learned

As with any partnership, it is important to give thought to your target audience and be sure that the sports teams you plan to approach are popular with families that could benefit from learning about low-cost and free health care coverage. MLS was a perfect partner for *Covering Kids & Families* because of its large Latino fan base.

It was also critical that *Covering Kids & Families* grantees in cities or states with an MLS team were connected to team representatives so they could work together to plan outreach activities. A great example of this was the Utah *Covering Kids & Families* Back-to-School Campaign press conference. The Utah grantee worked closely with Real Salt Lake to plan a press conference at the stadium, and the executive director of the team spoke at the press conference about the importance of Real Salt Lake's partnership with *Covering Kids & Families*.

Another important lesson is to have a clear understanding of why a particular team or player should be involved in the *Covering Kids & Families* Campaign and to have specific "asks" about how they can be involved, such as player appearances and materials distribution.

For more information about the Sports Philanthropy Project, please visit its Web site at **www.sportsphilanthropy.com**.

### 2005 Back-to-School Corporate Partners

*Covering Kids & Families* works with national and regional companies and associations to inform families with uninsured children about low-cost and free health care coverage available through Medicaid and the State Children's Health Insurance Program (SCHIP). Through its corporate partnerships, *Covering Kids & Families* promotes the national toll-free 1(877) KIDS-NOW number that parents can call to find out if their children are eligible for low-cost or free health care coverage. Since 2001, *Covering Kids & Families* health care coverage messages have been promoted through grocery bags, children's prescriptions, advertising circulars, milk cartons, paychecks, billing statements, newsletters, cereal boxes and Web sites, reaching a potential cumulative audience of more than 600 million people as they go about their day-to-day lives.

#### **Corporations**





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**ARAMARK**, a world leader in providing award-winning food and facilities management services to health care institutions, universities, school districts, stadiums and arenas, and a provider of uniform and career apparel, is raising awareness of the importance of health care coverage and promoting the availability of low-cost and free health care coverage and the national toll-free 1(877) KIDS-NOW number through its company newsletter and colorful paycheck inserts. <u>www.aramark.com</u>

**Capital One**, a diversified financial services company, has been a *Covering Kids & Families* partner for the past three years. This year, during designated months, Capital One is including a special message about available low-cost and free health care coverage and the national toll-free 1(**877**) KIDS-NOW number in its monthly billing statements. Additionally, Capital One is featuring the national toll-free number on its Web site insurance page to encourage parents whose children do not have health insurance to call and find out if their children are eligible. **www.capitalone.com** 

Giant Food LLC, which operates 203 Giant Food and Super G supermarkets in Maryland, Virginia, Delaware, New Jersey and Washington, DC, has been a *Covering Kids & Families* partner for the past five years. To reach potentially eligible families this summer, hundreds of thousands of Giant quart size milk cartons are featuring a *Covering Kids & Families* health care coverage message and the national toll-free 1(877) KIDS-NOW number. This fall, Giant will raise awareness of available low-cost and free health care coverage programs and promote the national toll-free number in its stores through posters, fliers and advertising circulars. Giant will also host outreach and enrollment events in select stores. <u>www.giantfood.com</u>

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The Kroger Family of Pharmacies, part of one of the largest grocery retailers in the country, is a new *Covering Kids & Families* national partner. This fall, Kroger will conduct a number of outreach activities, including featuring a *Covering Kids & Families* low-cost and free health care coverage message and the national toll-free 1(877) KIDS-NOW number on the back of a quarter of a million cereal boxes, airing public service announcements over its in-store PA system, and displaying posters in its pharmacies. Kroger pharmacists will encourage potentially eligible families to call the national toll-free number to find out if their children are eligible. <u>www.kroger.com</u>

**Major League Soccer (MLS),** the nation's top-flight professional soccer league comprised of 12 teams, is using its communications channels to educate soccer fans nationwide about the availability of health care coverage for kids. DC United stars Freddy Adu and Jaime Moreno have joined this effort as the national sports spokespersons. In addition, teams across the country will declare one of their games "Children's Health Care Coverage Day," and will promote the 1(877) KIDS-NOW toll-free number on Jumbotrons and in programs. <u>www.mlsnet.com</u>

**Stop & Shop**, the largest supermarket chain in New England, is working with *Covering Kids & Families* for the second year in a row. This fall, Stop & Shop will raise awareness of available lowcost and free health care coverage programs and promote the national toll-free 1(877) KIDS-NOW number in 270 of its stores in Connecticut, Massachusetts, New Jersey, New York and Rhode Island through posters, fliers and print public service announcements in advertising circulars. www.stopandshop.com

### National Associations



**The Amateur Athletic Union (AAU)**, the largest not-for-profit multisports organization in the United States, has been a *Covering Kids & Families* partner for five years. AAU has regularly included *Covering Kids & Families* outreach materials in mailings to its sports programs across the country, placed print public service announcements in its event programs and hosted outreach booths at national AAU events. This year, *Covering Kids & Families* will be featured in the AAU's Junior Olympics program guides. <u>www.aausports.org</u>



#### The National Association of Chain Drug Stores (NACDS),

representing the nation's leading retail chain pharmacies and suppliers, is encouraging its member companies and their pharmacists to participate in outreach efforts with *Covering Kids & Families* through its newsletter, The Practice Memo, which reaches more than 125,000 pharmacists nationwide. NACDS is also featuring *Covering Kids & Families* in its Issue Update newsletter, which reaches approximately 200 CEOs and CFOs, and 800 pharmacy operators. <u>www.nacds.org</u>

#### Media Partnerships



**Univision**, the most-watched Spanish-language broadcast television network in the U.S., is helping to raise awareness of available low-cost and free health care coverage programs for kids by airing public service announcements. <u>www.univision.com</u>



# **Business Template Materials**

The following template materials are included in this section and are available to download and tailor from the *Covering Kids & Families* Web site at <u>www.coveringkidsandfamilies.org</u>:

<u>Introductory Letter (Customer Outreach)</u> - This letter is best used for larger companies because it focuses on outreach to a business' employees and customers. Companies with more than 100 employees tend to have communication channels already in place to reach their employees and customers. Tailor this letter to fit your organization's needs and your business prospect's situation.

<u>Introductory Letter (Employee Outreach)</u> - This letter focuses on outreach to a business' employees only, so it may be more applicable to small-business prospects who are more likely to have uninsured employees. Customize this letter to fit your organization's needs and your business prospect's situation.

<u>Overview Memorandum</u> - This document provides an overview of the children's health care coverage environment and how a business partner can participate in outreach and enrollment efforts. Customize this document with state-specific information.

<u>Proposal</u> – Use the suggestions outlined in this document as a starting point for your outreach plans with a company. Modify the document so it reflects your particular business outreach plans. Some of your business prospects may not have the staff or financial resources for a few of the suggested outreach activities. Use your discretion in determining the outreach activities that are appropriate for each company.

<u>Frequently Asked Questions</u> – This is a brief, easy-to-read document that provides your business contacts with answers to questions about your organization, *Covering Kids & Families*, and Medicaid and SCHIP.

<u>Confirmation of Participation Letter</u> - This letter is a simple way to verify events or activities with your business contact. In addition to confirming the agreed-upon events or activities, thank the company for participating in your outreach efforts.

<u>Letter of Agreement</u> – This document provides more detail than the confirmation letter and serves as an agreement between your organization and a company for planned outreach activities.

<u>Thank You Letter to a Business</u> - Sending a thank you letter is important to building strong and successful business relationships. A thank you letter shows your appreciation for the business' participation and can increase its level of interest in working with you in the future. In each letter, stress the results of the business' outreach activities.

<u>Certificate of Appreciation</u> - A certificate is a simple reinforcement tool to thank companies for their participation in outreach efforts. You can customize the template with either the company name or logo.

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<u>PowerPoint Presentation</u> - Your business contact may want you to present your outreach ideas to others within their company. An informative presentation customized to the interests of a particular company can help "sell" involvement with your organization. Some useful tips for preparing your presentation precede the PowerPoint presentation. This PowerPoint presentation can be downloaded from the *Covering Kids & Families* Back-to-School Campaign Action Kit at www.coveringkidsandfamilies.org.

<u>News Advisory</u> - A news advisory gives the media information about an event to take place but does not give away all the "news" that will be announced at the event. An advisory should be emailed or faxed to the press three to five days before an event. It should be resent the day before the event and again the day of the event. Be sure to follow up with phone calls to encourage the press to attend your event.

<u>Press Release</u> - A press release is used to announce news. It is designed to read like a newspaper article, with the most important news appearing in the "lead" sentence. It contains factual information and quotes from spokespersons that underscore your message. A press release can be distributed at a news event or it can stand on its own as a vehicle to make an announcement. This template gives you a general format to follow when writing a press release.

<u>Drop-In Article</u> - A drop-in article can be sent to many different types of publications, including community newspapers, and organization and trade publications. This template drop-in article is intended for publications with a business focus. Tailor the article to fit your situation.

<u>Op-Ed</u> - An op-ed is traditionally printed on the page opposite the editorial page of a newspaper. It is by-lined by a single person or group of people and expresses both fact and opinion. An op-ed should be sent to the editorial page editor of a newspaper. This template op-ed is intended to be used by a children's advocate and a business partner. However, it can be adjusted to accommodate other types of authors.

<u>Employee and Customer Newsletters</u> - Many companies have employee and/or customer newsletters that they distribute on a regular basis. This template can be customized to describe a business' involvement with your organization and announce planned outreach activities.

<u>Talking Points</u> - Talking points help speakers convey a consistent message. These template talking points give you a foundation for developing talking points that communicate your partnership messages and the general message about low-cost and free health care coverage for children.

### [DATE]

[NAME] [TITLE] [COMPANY] [ADDRESS] [CITY], [STATE] [ZIP CODE]

Dear [PREFIX] [LAST NAME]:

You want [COMPANY] to continue to thrive. Taking care of your customers is one way to make sure your business succeeds. You can help your customers and your business by getting the word out about the [LOW-COST OR FREE] health care coverage for children that is available in your state.

In [STATE], there are [# OF UNINSURED CHILDREN IN STATE] uninsured children, many of whom are eligible for low-cost or free health care coverage through [*MEDICAID/SCHIP PROGRAM*]. A family of four earning up to [\$XX] a year or more may qualify for [*MEDICAID/SCHIP PROGRAM*]. Information is the key to connecting uninsured children to these available health care coverage programs.

[ORGANIZATION] is part of a national effort working to connect uninsured children to available health care coverage. This integrated communications campaign involves grassroots outreach activities, local and national media events, national business and organizational partnerships, and paid advertising. By getting involved in [ORGANIZATION]'s outreach efforts, your company can set the industry standard for community engagement, while also attracting attention and recognition from current and potential customers, business leaders, community groups, and your own employees. More importantly, [COMPANY] will be helping to inform families about the availability of health care coverage and how to apply for it. We can provide you with the tools to help inform employees, customers and community members about available health care coverage. Be involved—put children's health care coverage first!

We will follow up by telephone to discuss possible outreach activities between [COMPANY] and [ORGANIZATION]. If you have any questions, please do not hesitate to contact [NAME] at [TELEPHONE NUMBER] or visit our Web site at [ORGANIZATION OR *COVERING KIDS & FAMILIES* WEB SITE ADDRESS]. We look forward to working with [COMPANY].

Sincerely,

[NAME] [TITLE]

### NOTE: Remember to put your letter on your organization's letterhead.

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# [DATE]

[NAME] [TITLE] [COMPANY] [ADDRESS] [CITY], [STATE] [ZIP CODE]

Dear [PREFIX] [LAST NAME]:

You want [COMPANY] to continue to thrive. As you know, healthy employees and families contribute to a healthy bottom line. The productivity of your employees is often tied to the health and welfare of their children. Fewer sick days for kids means fewer sick days for their parents.

Thanks to [*MEDICAID/SCHIP PROGRAM*], many of your employees may be eligible for lowcost or free health care coverage for their children. For example, children in a family of four that makes [\$XX] a year or more could be eligible for [*MEDICAID/SCHIP PROGRAM*]. However, many of these working parents are not aware that this program exists. Businesses like yours are very important to reaching working families and helping increase the number of children who receive the health care coverage they need through [*MEDICAID/SCHIP PROGRAM*].

By telling your employees about the availability of low-cost and free health coverage for children, you will demonstrate that you care about the health of their families. Access to health care coverage for their children gives your staff more than just healthier families; it gives them peace of mind, allowing them to better focus on their jobs. We can provide you with the materials to help inform your employees about available health care coverage.

We will call you to set up a meeting to discuss how this program could work for your company and your employees. If you have any questions, please do not hesitate to contact [NAME] at [TELEPHONE NUMBER] or visit our Web site at [ORGANIZATION OR *COVERING KIDS & FAMILIES* WEB SITE ADDRESS]. We look forward to the opportunity to work with [COMPANY].

Sincerely,

[NAME] [TITLE]

NOTE: Remember to put your letter on your organization's letterhead.

# More than [# OF UNINSURED CHILDREN IN STATE] children are uninsured in [STATE].

# Most are eligible for low-cost or free health care coverage. [ORGANIZATION] is working to connect [STATE's] uninsured children to health care coverage programs.

# **Get Involved**

Imagine being forced to choose between taking your child to the doctor and buying groceries. This is a reality for many working parents, especially those with uninsured children. But it doesn't have to be.

You can help! The fact is, most uninsured children are eligible for low-cost or free health care coverage through [*MEDICAID/SCHIP PROGRAM*]. This program helps many working families that can't afford to participate in or are not covered by employer-based health plans and cannot afford private insurance. One of [ORGANIZATION]'s goals is to reach eligible families and help them get their children enrolled. By participating in outreach and enrollment efforts, you can help [ORGANIZATION] capture the attention of parents and children to inform them about available health care coverage programs. [COMPANY]'s participation, such as providing information to customers or hosting a [ORGANIZATION] enrollment event, will help parents learn if their children are eligible for health care coverage.

# **The Situation**

National research has found that many working parents with uninsured children who qualify for Medicaid or SCHIP do not think these programs are for them. Yet, an overwhelming number of these parents indicate they would enroll their children if they knew they were eligible. *Covering Kids & Families*, a national program of the Robert Wood Johnson Foundation, and its vast network of state and local coalitions are working to connect eligible, uninsured children to available health care coverage in a variety of ways, including grassroots outreach activities, local and national media events, national business and organizational partnerships, and paid advertising. [ORGANIZATION] is working with *Covering Kids & Families* to raise awareness of these programs among working families and help connect eligible, uninsured children to the health care coverage they need.

# Who's at Risk?

[PERCENTAGE OF CHILDREN IN STATE WHO ARE UNINSURED] percent of children in [STATE] are without health insurance. [PERCENTAGE OF UNINSURED CHILDREN IN STATE WITH ONE FULL-TIME WORKING PARENT] percent of uninsured children have at least one parent who worked full-time throughout the year.

# It is estimated that in [STATE]:

- [#] percent of all Hispanic children are uninsured
- [#] percent of all African-American children are uninsured
- [#] percent of all Asian and Pacific Islander children are uninsured
- [#] percent of all non-Hispanic white children are uninsured
- [#] percent of all low-income children are uninsured

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# Back-to-School Campaign [OR OTHER PROGRAMS]

[ORGANIZATION] will conduct its annual Back-to-School Campaign in [CITY, STATE] in [AUGUST OR SEPTEMBER] [YEAR]. Enrollment events and activities across [STATE] will include [INSERT DETAILS OF STATE BACK-TO-SCHOOL EVENTS]. Companies can participate by displaying [*MEDICAID/SCHIP PROGRAM*] information in their stores, holding on-site enrollment events and/or encouraging employees to volunteer in various enrollment events. Nationally, thousands of Back-to-School Campaign outreach and enrollment events and activities will occur during this same time period.

Between 2000 and 2005, the national *Covering Kids & Families* Back-to-School Campaign generated television, radio and print stories that reached an estimated total audience of more than 718 million readers, viewers and listeners. As a result of this extensive media coverage, there was an average increase in calls of 236 percent to the national hotline during the months of the campaign.

On [DATE], [YEAR], [ORGANIZATION] will kick off a Back-to-School Campaign with a news conference and [INSERT ACTIVITY] in [CITY, STATE]. This will be part of a nationally coordinated Back-to-School Campaign that includes enrollment events, news conferences and promotional advertising across the country. One of our goals this year is to engage the business community in outreach efforts. With the help of companies like yours, the [YEAR] Back-to-School Campaign is sure to be a big success.

# The Importance of Business Involvement

The goals of our outreach efforts are to inform families about the availability of low-cost and free health care coverage and to get eligible children enrolled. Businesses can help achieve these goals by capturing the attention of parents and children. [ORGANIZATION] can provide you with the tools you need to inform employees, customers and community residents about available health care coverage for children. In fact, we will do whatever it takes to make your outreach a success.

# Get Involved – Put Children's Health Care Coverage First!

**Note on Statistics for Uninsured Children:** For statistics on uninsured children, see the Fact Sheets in the <u>Resources</u> section or visit the *Covering Kids & Families* Web site at <u>www.coveringkidsandfamilies.org</u> for the most current statistics on health care coverage for children. For state-specific statistics, download the State-by-State Comparison of Children's Health Coverage chart in the *Covering Kids & Families* Back-to-School Campaign Action Kit at <u>www.coveringkidsandfamilies.org</u> or visit the Kaiser Family Foundation State Health Facts Web site at <u>www.statehealthfacts.org</u>. *Remember to footnote and provide sources for all numbers and facts that are included in this memorandum*.

### **PROPOSAL**

MEMORA	NDUM	ſ
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то:	[CONTACT NAME, TITLE, COMPANY]
FROM:	[NAME]
DATE:	[TODAY'S DATE]
RE:	[ORGANIZATION] and [COMPANY]Working Together!

The purpose of this memorandum is to outline how [COMPANY] and [ORGANIZATION] might work together to help children and families. **Please note: We are not seeking a monetary contribution from [COMPANY].** Rather, we would like to develop a partnership between [COMPANY] and [ORGANIZATION] to help enroll uninsured children and families in available low-cost and free health care coverage through [*MEDICAID/SCHIP PROGRAM*]. We would also like to recognize [COMPANY] publicly for its leadership on this important issue.

## COVERING KIDS & FAMILIES OUTREACH: A PERFECT FIT FOR [COMPANY]

There are more than 8 million uninsured children in the United States, with [# OF UNINSURED CHILDREN IN STATE] living right here in [STATE]. Many of these children are eligible for low-cost or free health care coverage through [*MEDICAID/SCHIP PROGRAM*], but they are not enrolled.

This campaign fits perfectly with [COMPANY]'s community relations mission. [COMPANY] plays a significant role in the lives of many American families. As a leader [INSERT LANGUAGE ABOUT UNIQUE NATURE OF COMPANY/COMMUNITY RELATIONS MISSION], [COMPANY] is in a unique position to connect eligible uninsured children to the health care coverage they need.

In [MONTH], the Robert Wood Johnson Foundation will launch the annual *Covering Kids & Families* Back-to-School Campaign. As parents prepare their children for a new school year, *Covering Kids & Families* reaches out to families whose children are uninsured and encourages them to put enrolling their children in Medicaid or SCHIP at the top of their back-to-school checklist. Last year, the campaign reached hundreds of thousands of families through public service advertising, media outreach, corporate and organizational partnerships, and thousands of grassroots activities across the country.

### HOW [COMPANY] CAN GET INVOLVED

Companies large and small are using their communication and marketing channels to promote the availability of low-cost and free health care coverage programs. Examples of *Covering Kids & Families* national corporate partners have included Capital One, CVS/pharmacy and H & R Block. In [STATE], we have received strong participation from [LIST CORPORATE SUPPORTERS].

[ORGANIZATION] would like to explore ways to collaborate with [COMPANY]. Ideally, [COMPANY] will reach out to its customers during August and September, when thousands of

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back-to-school outreach and enrollment activities are taking place in all 50 states and the District of Columbia. We have found that if parents repeatedly see and hear messages through multiple communication channels during the course of their day-to-day lives, they are more likely to act to get their uninsured children enrolled. Of course, if the back-to-school season is not conducive to your schedule, we would welcome your participation at another time during the year. Following are some ways that [COMPANY] can participate in the campaign:

# [NOTE: SUGGESTIONS SHOULD BE ADAPTED FOR EACH COMPANY]

- Consumer E-mail Newsletter [COMPANY] can include an article about the importance of health care coverage and the availability of low-cost and free coverage for children through Medicaid and SCHIP in its consumer e-mail newsletter or other company newsletter. A template article can be provided by [ORGANIZATION].
- Point-of-Purchase Display [COMPANY] can promote the importance of health care coverage for kids at cash registers and checkout counters, and encourage parents to call the 1(877) KIDS NOW toll-free number to find out if their uninsured children are eligible. [ORGANIZATION] can provide template materials that can be customized for display.
- Product Packaging [COMPANY] can add a banner or text providing information about low-cost and free health care coverage and the national toll-free 1(877) KIDS-NOW number on or in product packaging. [ORGANIZATION] can provide examples of how other companies have done this in the past.
- Fliers [COMPANY] can distribute fliers with information about available low-cost and free health care coverage programs to customers. [ORGANIZATION] can provide a customizable flier template.
- **Capitalizing on Existing Community Work** [COMPANY] already sponsors [ADD SPECIFIC INFORMATION]. Because these are established corporate commitments with working relationships in place, [COMPANY] may be able to incorporate health care coverage awareness and outreach activities with an existing sponsorship or program.
- Leveraging Advertising Each year, [COMPANY] invests in print, radio and television advertising. Your commitment to the health and well-being of your employees, customers and their children could be leveraged through an existing advertising buy. [COMPANY] could agree to add a line promoting health care coverage programs and the national toll-free hotline number to an existing ad.
- Hosting Enrollment Events [COMPANY] can hold an enrollment event on site for the benefit of its customers and other members of the community. [ORGANIZATION] can coordinate volunteers to distribute brochures, talk to customers about [MEDICAID/SCHIP PROGRAM], and provide applications and enrollment assistance.
- Web Site Promotions [COMPANY] can post a Web banner and/or information about health care coverage programs and the national toll-free number on its company Web site. [ORGANIZATION] can provide a template Web banner or language for the Web site.

[ORGANIZATION] will collaborate with [COMPANY] to build a partnership that works. We will also recognize the work and support of [COMPANY] in our press materials, on our Web site

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and at our events, including the [STATE] launch event. As we determine the details of our partnership with [COMPANY], we will also discuss the various and appropriate ways that we can publicly recognize [COMPANY]'s participation. Following is a list of some additional ways [ORGANIZATION] can work with you:

- Provide generic posters and fliers with the national toll-free 1(877) KIDS-NOW number for distribution [NOTE TO OUTREACH WORKER: LARGE QUANTITIES SHOULD BE DISCUSSED ON A CASE-BY-CASE BASIS.]
- Serve as a resource by providing general information and content for materials, articles and media
- Conduct enrollment and outreach events in your stores

# **RESULTS SHOW THAT COVERING KIDS & FAMILIES HAS BEEN SUCCESSFUL**

Data released by the Urban Institute's National Survey of America's Families suggests that *Covering Kids & Families*, its partners and others working on children's health coverage enrollment have made strides. Since just prior to the launch of the first *Covering Kids & Families* Back-to-School Campaign in 2000:

- Nearly 5 million additional children have been enrolled in Medicaid and SCHIP.
- The number of uninsured children has declined by 1.8 million.
- Awareness of SCHIP among eligible families increased from 47 percent in 1999 to 71 percent in 2002.

The Urban Institute's researchers concluded: "Outreach efforts in recent years have paid off. More low-income families are familiar with Medicaid or SCHIP and fewer are confused about eligibility requirements."

We look forward to discussing these and other potential partnership opportunities with you at your earliest convenience. We will call you to follow up in the next few days. If you have any questions, please feel free to contact [NAME] at [TELEPHONE NUMBER] or [ $\underline{E}$ -<u>MAIL</u>].

Enclosures

NOTE: Remember to put your letter on your organization's letterhead.

## What is [ORGANIZATION]?

## [INSERT DESCRIPTION OF YOUR ORGANIZATION]

#### What is Covering Kids & Families?

In 2002, the Robert Wood Johnson Foundation (RWJF) launched *Covering Kids & Families*, a \$55 million national initiative that offers grants to statewide coalitions to increase the number of children and adults who benefit from federal and state health care coverage programs. *Covering Kids & Families* builds on the work of *Covering Kids*, another RWJF national program active from 1998 to 2002. Working with broad statewide and local coalitions, *Covering Kids & Families* facilitates efforts to: 1) conduct and coordinate outreach programs; 2) simplify enrollment and renewal processes; and 3) coordinate existing coverage programs.

#### What is Medicaid?

Medicaid provides health care coverage to three main groups of low-income Americans: parents and children, the disabled, and the elderly. Enacted by Congress in 1965, Medicaid makes federal matching funds available to states to cover the cost of health care services to eligible individuals in all 50 states and the District of Columbia. Children represent half of all Medicaid beneficiaries but account for only 16 percent of program expenditures.<sup>1</sup>

#### What is SCHIP?

In 1997, Congress enacted the State Children's Health Insurance Program (SCHIP) to allow states to develop programs that provide health care coverage for uninsured children from low-income and moderate-income families. All 50 states and the District of Columbia have SCHIP. Income eligibility and other program features vary by state.

#### Why is it important that children have health insurance?

Health care coverage helps keep children healthy, and healthy children are better prepared to learn. According to the Urban Institute's analysis of the National Health Interview Survey, nearly half of all uninsured children (48%) have not had a well-child visit in the past year.<sup>2</sup> Illnesses that are left untreated and result in missed days of school can lead to poor performance in the classroom. That is why it is so important that we enroll the millions of eligible children who are needlessly going without health insurance into available low-cost and free health care coverage programs. Parents can call 1(877) KIDS-NOW to find out if their children are eligible.

#### What is the most a family can earn in order to be eligible for these programs?

Eligibility varies by state. In most states, a family of four earning up to \$38,000 a year may qualify. Since eligibility does vary by state and family size, it is important for all families to call 1(877) KIDS-NOW to learn if their children are in fact eligible for low-cost or free health care coverage.

<sup>&</sup>lt;sup>1</sup> The Kaiser Commission on Medicaid and the Uninsured, "The Medicaid Program at a Glance." (January 2001).

<sup>&</sup>lt;sup>2</sup> An Urban Institute Analysis of The Center fior Disease Control's 2002 National Health Insurance Survey. (August 2004). www.coveringkidsandfamilies.org/press/docs/2004UrbanFindings.pdf

#### Are children of immigrant families that meet the income requirements eligible?

All children who are citizens of the United States are potentially eligible, even if their parents are immigrants and not citizens. Documented immigrant children who entered the country before August 22, 1996, may be eligible for Medicaid or SCHIP. For those children who entered the country after August 22, 1996, eligibility for health care coverage programs varies by state.

#### What is the Covering Kids & Families Back-to-School Campaign?

As parents prepare their children for the new school year, *Covering Kids & Families* launches its annual *Covering Kids & Families* Back-to-School Campaign to inform parents of the low-cost and free health care coverage that is available in all 50 states and the District of Columbia through Medicaid and SCHIP. Many working families with children who are eligible for these programs do not believe their kids qualify. However, these programs are designed to include working families. Eligibility varies by state, but, on average, families earning up to \$38,000 a year may qualify for low-cost or free children's health care coverage. For more information, families can call 1(**877**) KIDS-NOW.

#### Do Covering Kids & Families and the Back-to-School Campaign work?

Yes, without a doubt, they work. The Urban Institute's 2002 National Survey of America's Families shows that simplification, coordination and outreach efforts in recent years have paid off. Awareness of Medicaid and SCHIP among low-income families with uninsured children has increased dramatically, from 47 percent in 1999 to 71 percent in 2002, and an additional 4.8 million children have enrolled in Medicaid or SCHIP between 1999 and 2002. While we cannot take credit for all of this success, *Covering Kids & Families* is the nation's single largest effort of its kind and the Back-to-School Campaign is the single largest educational campaign on this issue. We, along with our partners, have certainly contributed to this major advancement.

# How can families get more information about low-cost and free health care coverage in their state?

Families that would like to find out if their children qualify for low-cost or free health care coverage can call [STATE HOTLINE NUMBER] or the national toll-free number, *1*(877) *KIDS-NOW. Information is also available at [ORGANIZATION OR MEDICAID/SCHIP PROGRAM WEB SITE ADDRESS] or www.insurekidsnow.gov.* 

# [DATE]

[NAME] [TITLE] [COMPANY] [ADDRESS] [CITY], [STATE] [ZIP CODE]

Dear [PREFIX] [LAST NAME]:

[ORGANIZATION] is grateful for [COMPANY]'s participation in outreach activities to inform eligible families that low-cost and free health care coverage for children is available in [STATE].

This letter is to confirm that [COMPANY] has agreed to [INDICATE ACTIVITY] on [DATE].

If you have any questions, please contact me at [TELEPHONE NUMBER].

Thank you again for supporting this important endeavor.

Sincerely,

[NAME] [TITLE]

NOTE: Remember to put your letter on your organization's letterhead.



# [DATE]

[NAME] [TITLE] [COMPANY] [ADDRESS] [CITY], [STATE] [ZIP CODE]

Dear [PREFIX] [LAST NAME]:

[ORGANIZATION] is pleased to have the opportunity to work with [COMPANY] to connect uninsured children to available health care coverage and promote [COMPANY]'s involvement.

This letter serves as a written agreement between [ORGANIZATION] and [COMPANY]. It outlines the nature of this partnership, expectations for each organization, and a timeline for accomplishing these expectations. [THE POINTS BELOW ARE EXAMPLES.]

#### [COMPANY] agrees to the following:

- Inform [COMPANY] employees that [COMPANY] is working with [ORGANIZATION] to reach working parents with uninsured children to let them know their children may be eligible for low-cost or free health care coverage, and help get them enrolled
- Post health care coverage information in [COMPANY] offices (e.g., posters)
- Provide fliers and applications to families that request information
- Provide a contact form for interested families to fill out if they would like a [ORGANIZATION] representative to contact them and provide information and application assistance
- Provide office space for [ORGANIZATION] enrollment activities
- Offer [COMPANY] employees the opportunity to be trained to provide application assistance

#### [ORGANIZATION] agrees to the following:

- Provide a sufficient quantity of enrollment applications to [COMPANY]
- Provide program promotional materials and/or templates
- Be available to conduct a presentation on [MEDICAID/SCHIP PROGRAM]
- Train [COMPANY] employees who are interested in providing application assistance
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   & families

- Provide staff and coordinate enrollment events at [COMPANY] offices during mutually agreed-upon dates and times
- Promote [COMPANY] enrollment events using [ORGANIZATION] communications tools
- Provide [COMPANY] with periodic updates of [ORGANIZATION] outreach efforts in the community
- Invite [COMPANY] representatives to [ORGANIZATION] events
- Recognize [COMPANY] outreach efforts when providing the media with examples of business outreach activities in the community

[NAME]	[NAME]
[TITLE]	[TITLE]
[COMPANY]	[ORGANIZATION]
[DATE]	[DATE]

Enclosure: Timeline

**NOTE:** Remember to put your letter on your organization's letterhead and include a timeline for accomplishing the above expectations.

[DATE]

[NAME] [TITLE] [COMPANY] [ADDRESS] [CITY], [STATE] [ZIP CODE]

Dear [PREFIX] [LAST NAME]:

[ORGANIZATION] would like to thank you for your participation in [SPECIFIC ACTIVITY]. Your involvement demonstrated [COMPANY]'s support for children's health care coverage and helped make our effort a tremendous success. Making sure that every child has health care coverage is no easy task. The active role you have taken in this effort is a vital step toward ensuring that all children in our community have the health care coverage they need.

[INSERT PARAGRAPH ABOUT RESULTS, EVENT ANECDOTE, PRESS CLIPPINGS, ETC.]

[COMPANY]'s efforts helped raise awareness of the number of uninsured children who are eligible for [*MEDICAID/SCHIP PROGRAM*]. On behalf of [ORGANIZATION], we thank you for your hard work.

We look forward to working with you in the future.

Sincerely,

[NAME] [TITLE]

NOTE: Remember to put your letter on your organization's letterhead.



[INSERT ORGANIZATION LOGO]

# [INSERT ORGANIZATION NAME]

RECOGNIZES

# [INSERT COMPANY NAME]

THANK YOU FOR YOUR COMMITMENT TO THE HEALTH OF AMERICA'S CHILDREN



#### POWERPOINT PRESENTATION AND TIPS

The PowerPoint presentation is a tool you can use in a meeting with your business prospects. You can use it as a computer-projected presentation, slides or transparencies, or you can print it out and use it as a handout to "walk through" in a meeting. If you will need projection equipment for your meeting, be sure to check with your company contact ahead of time to see if they have it. To download the PowerPoint presentation, go to the *Covering Kids & Families* Back-to-School Campaign Action Kit at <u>www.coveringkidsandfamilies.org</u> and download the PowerPoint Presentation for Organizations, Corporations and Sports Teams.

A well-organized, tailored presentation will help you in your business outreach efforts.

- Review each slide and customize it to your organization's needs and the business' interests.
- Add, delete or change slide order depending on the content of your presentation.
- Make sure the presentation follows a logical order.
- Practice the presentation in front of your colleagues and ask for comments about the content and message, improvements and clarification that might be needed, and the length of the presentation.
- Bring extra equipment supplies (e.g., an extra light bulb for the projector in case the bulb blows out).
- Save the presentation in several places (e.g., on a floppy disk, your hard drive and in your e-mail inbox). Bring hard copies, too.
- Leave ample time for company representatives to ask questions or make comments.

#### <u>NEWS ADVISORY</u> (Send three to four days before your event.)

### [FROM THE ACTION KIT – already approved]

NEWS ADVISORY: [DATE] CONTACT: [LOCAL CONTACT PERSON]/[PHONE#]

News Advisory Headline to Announce That Something Will Be Happening—the News Hook *"Kicker" in italics contains the secondary piece of info that is also a hook* 

As in a press release, your first sentence should reveal information about the "news" that will be coming. It is always loaded with information about the who, what, when and where, without giving away the entire story. Write this in a way that will interest the media, but does not give away so much that they do not need to come to the event or receive a full press release to report on it.

Make the event facts in your media advisory easy to read by highlighting them with bullets or placing them in a box like the one below.

What:	Description of the event written in a uniquely newsworthy way
Who:	<ul> <li>Names and titles of your spokespersons, except families, which should be listed as:</li> <li>Families from [REGION/STATE] enrolled in [MEDICAID/SCHIP PROGRAM]</li> </ul>
Where:	Exact address of event, with directions if necessary
When:	Day of week, date of event, time

End your advisory with a brief description of your organization and the program.

- ✤ B-roll with footage of enrollment events/activities around the nation, families receiving medical care, children headed back to school and children receiving checkups will be available at the event and between [TIME], [DATE] at [SATELLITE COORDINATES].
- ✤ A radio actuality with sound bites from [SPOKESPERSON NAME AND TITLE] will be available from [DATE TO DATE] at [PHONE #].

NOTE: Remember to put your news advisory on your organization's letterhead.

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#### <u>PRESS RELEASE</u> (Send the morning of your event.)

FOR IMMEDIATE RELEASE [DATE]

Contact: [NAME] [PHONE NUMBER]

#### **Headline Making Your Announcement**

"Kicker" in italics contains additional information that adds to newsworthiness

([CITY, STATE]) – Your first sentence, "the lead," should contain your most important news announcement providing the basic facts on who, what, when, where and why. Your second sentence can include whatever pieces of important information you cannot fit in the first sentence.

"The second paragraph is often a quote that delivers a major message point of your announcement," said [YOUR ORGANIZATION'S PRESIDENT, ELECTED OFFICIAL OR SPOKESPERSON]. "The quote should state an opinion and add a human voice to the story. The person writing the press release may craft the quote in order to ensure that it is on message; however, it *must be approved* by the person to whom it is attributed."

In paragraph three, continue with more information on the announcement. Include interesting information that is part of your main message.

"Include a quote from your new business partner explaining their interest in the partnership," said [NEW BUSINESS PARTNER SPOKESPERSON]. "Be sure to make the quotes sound conversational."

Include details about the partnership. If specific activities are planned, list them. Be sure to include a telephone number that parents can call if they would like to learn more.

The last paragraph tells the public what you most want them to know about your organization and your business partner.

###

If you need help producing media materials, contact your local chapter of the Public Relations Society of America (PRSA) to see if it has volunteers who could help you. Or call your local college or university to ask for assistance from journalism or public relations students.

#### NOTE: Remember to put your news advisory on your organization's letterhead.

# [COMPANY] to Help Connect Uninsured Kids to Affordable Health Coverage

[COMPANY] has signed on to help inform families with uninsured children about low-cost and free health care coverage available through [*MEDICAID/SCHIP PROGRAM*]. Of the [# OF UNINSURED CHILDREN IN STATE] uninsured children in [STATE], most qualify for coverage. Unfortunately, many of their parents may not know their children qualify.

[COMPANY] plans to provide a link between parents with uninsured children and information about [*MEDICAID/SCHIP PROGRAM*].

"We want to make sure that parents, even those who work, know their kids could qualify for affordable health care coverage," said [COMPANY SPOKESPERSON].

#### Eligibility has been expanded in every state to include many moderate-income families. In [STATE], a family

# Kids with Health Care Coverage Are Better Prepared to Learn

- MOST children in America's classrooms who are uninsured are eligible for [LOW-COST OR FREE] children's health care coverage.
- Half of all uninsured children have not had a well-child visit in the past year.
- Uninsured children are less likely to receive proper medical care for sore throats, earaches and asthma—common childhood illnesses that are often the cause of school absences.

of four earning up to [\$XX] a year or more may qualify for low-cost or free health care coverage for their children.

[COMPANY] is working with [ORGANIZATION] to reach out to [STATE] families and tell them about [*MEDICAID/SCHIP PROGRAM*]. The partnership will kick off on [DATE OF EVENT/ACTIVITY] when [COMPANY] [DESCRIPTION OF ACTIVITY].

Kids enrolled in [MEDICAID/SCHIP PROGRAM] are eligible to receive [LIST BENEFITS].

"[*MEDICAID/SCHIP PROGRAM*] offers comprehensive coverage, much like private health insurance programs," said [LOCAL STATE HEALTH OFFICIAL AND AGENCY NAME], the agency that administers the program.

"Those of us who work at [COMPANY] are excited about this partnership. It gives us a way to give back to the community, the effects of which could resonate for generations to come," said [COMPANY SPOKESPERSON].

To find out if your child is eligible for low-cost or free health care coverage, call [STATE TOLL-FREE HOTLINE NUMBER] or visit [WEB SITE ADDRESS].

#### <u>OP-ED</u>

#### Covering Kids & Families: A Team Effort By: [NAMES OF CHILDREN'S ADVOCATE AND BUSINESS PARTNER]

It's not often that a children's advocate and a business owner jointly write an op-ed. On the surface, we have very different jobs with very different goals. But dig a little deeper and you'll find there is much we have in common. We both care about our community, and we both know that a community is only as strong as the health of its children. That's why we are teaming up to help [STATE/COMMUNITY]'s uninsured children.

[# OF UNINSURED CHILDREN IN STATE] [STATE] children are uninsured. Research shows that parents with children who do not have health care coverage are more likely to be forced to delay or not seek medical care for their kids than parents whose children have health insurance. Many uninsured children are going without health care services when they need them because their parents cannot afford to pay. Parents of uninsured children are also more likely not to fill or delay filling prescriptions than parents of insured kids.

These findings are disturbing for everyone in our community. No child should go without needed health care. Fortunately, there is good news. Most uninsured children in [STATE] are eligible for low-cost or free health care coverage through [*MEDICAID/SCHIP PROGRAM*]. But the problem is that many parents of uninsured children may not know these programs exist, or they think they do not qualify because they work.

The key to getting eligible children enrolled is informing their parents about these programs and encouraging them to apply. We are working together to help spread the word to families in [STATE/COMMUNITY] that these programs exist for them. Companies that come in contact with families every day can play a critical role in informing them about these programs. That's why [COMPANY] will be [LIST OF PARTNERSHIP ACTIVITIES].

Many of the country's leading companies and organizations have joined the Robert Wood Johnson Foundation's *Covering Kids & Families* Initiative in a nationwide effort to connect eligible, uninsured children with low-cost and free health care coverage.

Families that would like to learn more about low-cost and free health care coverage can call [STATE TOLL-FREE HOTLINE NUMBER].

At [COMPANY] we care about all of our customers—and their families. That's why we've become a partner in the effort to connect uninsured children to low-cost or free health care coverage.

[# OF UNINSURED CHILDREN IN STATE] children in [STATE] are uninsured. Most of these children are eligible for low-cost or free health care coverage through [*MEDICAID/SCHIP PROGRAM*]. But many parents of uninsured children do not know about [*MEDICAID/SCHIP PROGRAM*]. That's why we've decided to help. As a business in this community, we see families every day. We know that we can play a major role in helping to inform parents that their children may be eligible for coverage, even if they work.

We plan to [LIST ACTIVITIES – GET DATES OF ENROLLMENT EVENTS IF POSSIBLE] over the next [TIME PERIOD].

When you're in the [TYPE OF BUSINESS] business, you owe it to your community to be involved. Helping uninsured kids get the coverage they need is a goal worth striving for and one that will provide benefits for years to come. We are excited about this new endeavor and look forward to doing our part to get all eligible uninsured children enrolled in [*MEDICAID/SCHIP PROGRAM*].

# Introduction and Covering Kids & Families Overview:

- Hello, my name is [NAME]. I am calling on behalf of [ORGANIZATION] to discuss the possibility of involving [COMPANY] in our annual *Covering Kids & Families* Back-to-School Campaign.
- [PAUSE. ASK IF THIS IS A GOOD TIME TO TALK AND IF THEY ARE THE RIGHT PERSON TO SPEAK WITH.]
- Currently, there are more than 8 million uninsured children in the United States. That includes [# OF INSURED CHILDREN IN STATE] uninsured children here in [STATE]. Many of these children are eligible for low-cost or free health care coverage, but they are not enrolled.
- *Covering Kids & Families* is a national program of the Robert Wood Johnson Foundation helping to connect eligible uninsured children to low-cost and free health care coverage available through Medicaid and the State Children's Health Insurance Program (SCHIP).
- These health care coverage programs are available in every state and the District of Columbia. You may be familiar with the program in our state—[*MEDICAID/SCHIP PROGRAM*].
- To reach eligible children and families, a nationwide *Covering Kids & Families* Back-to-School Campaign is organized right before the start of school each year to raise awareness of low-cost and free health care coverage programs, and encourage parents to put enrolling their children at the top of their back-to-school checklist. Here in [STATE] we are [INSERT ACTIVITIES.]

## **Business Outreach – How Companies Can Get Involved:**

- Business community involvement in the *Covering Kids & Families* Back-to-School Campaign is extremely important. Companies large and small use their communication and marketing channels—such as newsletters, in-store circulars, billing statements and Web sites [INCLUDE ANY OTHERS RELEVANT TO THE COMPANY]—to promote the availability of low-cost and free health care coverage programs and the U.S. Department of Health and Human Services national toll-free number, 1(877) KIDS-NOW, which parents can call to find out if their children are eligible.
- Some examples of *Covering Kids & Families* national corporate partners have included Capital One, CVS/pharmacy and H&R Block.
- [COMPANY] is a leader in [INDUSTRY/THE COMMUNITY/THE NATION] and can reach potentially eligible families with important health care coverage information.
- For example, [COMPANY]'s involvement could include [IDENTIFY APPROPRIATE COMPANY-SPECIFIC EXAMPLES].
- [ORGANIZATION] will work with [COMPANY] to facilitate its involvement in this national effort. For example, we can provide [COMPANY] with template materials such as articles, posters and fliers.

# **Closing Remarks:**

- Do you have any questions that I can answer at this time?
- I'd like to send you more information that describes *Covering Kids & Families* and [ORGANIZATION] and explains in more detail how [COMPANY] can get involved and the benefits of involvement. [CHECK MAILING ADDRESS/E-MAIL WHILE ON PHONE]
- I'll call you [GIVE SPECIFIC TIME FRAME] to follow up. Thank you for taking the time to discuss this opportunity. I hope [COMPANY] will agree to participate.

<u>covering kids</u> &families

# **Glossary of Business Terms**

The business world has its own terminology. Increasing your familiarity with common business terms and industry jargon can help you in your business recruiting efforts. The following terms may arise in a conversation related to your business outreach activities.

#### Associates

Many retailers refer to their employees as "associates."

### Brand

A company name or product name along with its logo or word mark.

#### **Bottom Line**

A business' profit margin.

#### **Cause-Related Marketing (CRM)**

Partnership between a nonprofit and a corporation designed to benefit the nonprofit and meet corporate business objectives. Unlike philanthropy, money spent on cause-related marketing is not a donation; it is a business expense.

**Example:** American Express made a one-cent donation to the restoration of the Statue of Liberty every time its credit card was used. The number of new card holders grew by 45 percent and card usage increased by 28 percent.

#### **Cost/Benefit Analysis**

A method of discerning the benefits expected from a decision by measuring the costs of that decision and determining whether the benefits will outweigh the costs.

### **Cross-Promotion**

When two or more organizations create promotional opportunities that are mutually beneficial.<sup>1</sup>

### **Demographics**

Data about people or a marketplace, such as age, sex, marital status, income, ethnicity, employment status, etc.

### Exclusivity

The right to be the only company sponsoring an event or activity. Exclusivity is a benefit you can offer a business partner.

#### **Fiscal Year**

The 12-month period that a company uses for budgeting and financial reporting. Often a company's fiscal year runs independently of—or does not parallel—the actual calendar year.

### Franchising

Selling the right to operate an established business to an individual or company in another location. The individual or company assumes the responsibility of operating the business and

<sup>&</sup>lt;sup>1</sup> Anne-Marie Grey and Kim Skildum-Reid. The Sponsorship Seeker's Toolkit, p. 165. (1999).

must provide capital to operate under the parent company's name. The corporate owner provides name recognition and, in some cases, access to products and technical assistance.

**Example:** McDonald's and Burger King franchise restaurants to individual owners called franchisees.

### Grant

The provision of funds or material for a specific project generally not linked to a company's core business. A grant is usually given to a project on the basis of need rather than the promotional and marketing opportunities it may provide.<sup>2</sup> Larger companies often establish foundations that make grants to community initiatives.

## **In-Kind Sponsorship**

Payment (full or partial) of sponsorship fee in goods or services rather than cash.<sup>3</sup>

## Licensing

A partnership in which one organization sells the rights to use its name, logo or image to another organization.

## **Media Sponsor**

TV, radio, print and outdoor advertising companies that provide cash, advertising time or space to an organization in exchange for official designation as a sponsor.<sup>4</sup>

# **On Premise**

A promotion that takes place at the business location.

# OTC

Term used by the drugstore industry for "over-the-counter," nonprescription medications. Aspirin is an example of an OTC medication.

### Philanthropy

Support for a nonprofit organization where no commercial advantage is expected.<sup>5</sup>

### Point of Sale (POS)

This term refers to a location in a store, usually near the cash register, where a customer can view products and select items to buy. Also known as point of purchase (POP).

### Premium

A token item from a company with the company name and logo that is usually given away free or with a purchase.

**Example:** A customer receives a Clinique gift bag with any purchase over \$50. In *Covering Kids & Families* language, free premiums are called giveaways.

<sup>&</sup>lt;sup>2</sup> Anne-Marie Grey and Kim Skildum-Reid. The Sponsorship Seeker's Toolkit, p. 168. (1999).

<sup>&</sup>lt;sup>3</sup> Selling More Sponsorship, p. B-2. IEG, Inc., (2000).

<sup>&</sup>lt;sup>4</sup> Selling More Sponsorship, p. B-3. IEG, Inc., (2000).

<sup>&</sup>lt;sup>5</sup> Ibid.

#### **Psychographics**

A description of an individual and their values and lifestyle (e.g., an SUV owner who commutes to the city daily, attends soccer games on weekends and eats out with family after games).

#### **Restricted Funds vs. Unrestricted Funds**

Restricted funds are used for a specific purpose. Unrestricted funds are flexible and are sometimes referred to as discretionary funds.

#### **Quick Service**

A restaurant industry term referring to fast-food businesses such as McDonald's, Burger King and Wendy's.

#### **Return on Investment (ROI)**

An estimate of the financial benefit (the "return") from money spent (the "investment") on a particular project.

#### Servicing

Providing benefits (agreed and additional) to sponsors to assist them in achieving their objectives in return for their sponsorship.<sup>6</sup>

#### Shelf Program

A grocery/retail term indicating promotions related to where products can be found. Product location is extremely important. Shelf space is a related term. End aisle display refers to the premium space at the end of an aisle that provides greater consumer visibility.

#### **Sponsorship**

An investment in a community activity, cause or event that yields a commercial return for the sponsor.<sup>7</sup>

#### **Target Audience**

The most appropriate audience for a particular product, service or event.<sup>8</sup> For Covering Kids & Families, the target audience is usually families with eligible uninsured children.

#### **Target Market**

A group of consumers who are likely purchasers of a product or service and who share a similar demographic profile.<sup>9</sup>

#### Turnkey

A term used to describe a program that is easy to implement.

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Anne-Marie Grey and Kim Skildum-Reid. The Sponsorship Seeker's Toolkit, p. 167. (1999) Anne-Marie Grey and Kim Skildum-Reid. The Sponsorship Seeker's Toolkit, p. 168. (1999)

<sup>9</sup> Ibid



A National Program of the Robert Wood Johnson Foundation