MARCOM Awards

AECOM Health Care Reform and Open Enrollment

Category 52c. Benefits Communication

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Executive Summary

AECOM is a global provider of professional technical and management support services to a broad range of markets including transportation, energy, water, sports arenas and government, to name a few. With expertise in architecture, design, engineering and construction, our 45,000 global employees serve clients in more than 150 countries and generated revenue of USD $8B in 2013.

The Health Care Reform and Open Enrollment campaign was launched to help increase employee awareness of health care reform's impact on AECOM medical plans and costs, the company's need to comply with health care reform, and the importance of personal accountability for health care spending. The business need was further clarified by claims and financial analysis conducted by Mercer, AECOM's health care consulting partner, which showed that 2014 medical care renewal costs would increase by $7MM if no plan design changes took place. Taking a longer view, especially as all impacted U.S. employers looked at the 2018 excise tax implications, AECOM's leadership determined its employees could understand the complex health care environment and the need for changes due to the new legislation, if given ample time, tools, and information to make well-informed decisions.

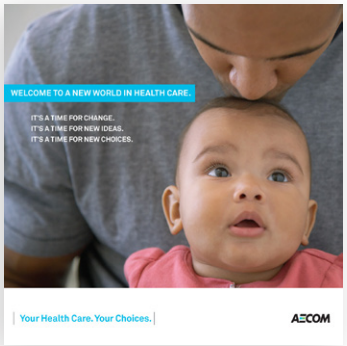
COMMUNICATION AND CREATIVE STRATEGY

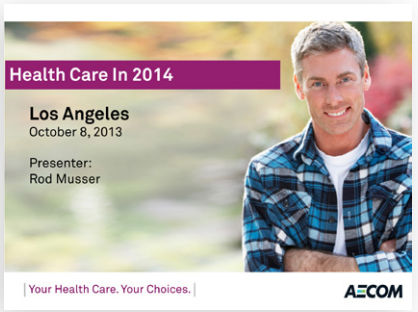
Engaging employees in the topic of health care reform and driving enrollment into AECOM's new Consumer Driven Health Plan (CDHP), called the Premier Plus medical plan, a cost-effective medical plan that encouraged employee accountability for their health care choices, called for a consistent, multi-media approach. The campaign featured print, electronic, face-to-face, and interactive, online communication — both at home and at work. As an added convenience, all eCards and the health care portal were programmed using responsive web design to ensure employees could access and easily navigate the site from computers, iPads and mobile devices. The campaign was organized into a multi-pronged approach: Leadership Communications, Health Care Reform, Benefits Roadshows, and Open Enrollment.

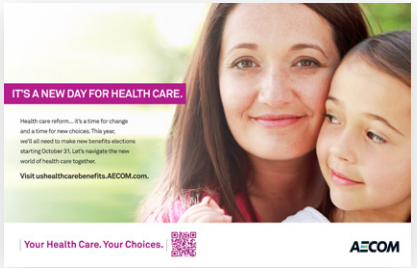
The campaign also required that we create opportunities for targeted messaging to reach out to our two subgroups: those who completed *Wellness at AECOM* and "qualified" for the wellness medical plans including the new Premier Plus Plan, and those who did not. Additionally, our claims analysis research indicated that spouses and domestic partners represented the largest percentage of claims experience and health care costs, so reaching out to this group was vital.

Conceptually, the tagline, *Your Health Care. Your Choices.*, together with beautiful imagery and the established AECOM color palette, created a campaign brand that was warm and welcoming.

Note: Please see our campaign results on the following page.







Results

EXCEEDING EXPECTATIONS MEANS SUCCESS!

At the onset, AECOM determined that this campaign would be considered an enormous success if employees engaged in the process, if AECOM achieved 25% enrollment in the Premier Plus Plan, and if migration was achieved without a negative impact on employees' perception of their benefits. The results far exceeded the goals established:

OBJECTIVE	RESULT
1. To illustrate the changing health care industry and emphasize the employee's need to learn more about the changes, carefully review their medical plan choices, and make responsible decisions that would impact their personal health and health care choices.	• Over 16,000 visits to the health care portal were logged during the campaign. 1,100+ hits in the first hour — nearly 10% of the employee population! • 53% of invited employees attended a Benefit Roadshow and hundreds more viewed the meeting presentation online. • Less than 1% of the eligible population defaulted into plan coverage, meaning 99% engaged by going to the Open Enrollment website and making their 2014 enrollment elections. • Anecdotal evidence of the Benefits Roadshow's success came from all over the country: — "...Everyone is a buzz — but once the initial scare goes away – we are hearing positive things! The site is working very well — and the tools and resources available are A+++." — *Senior Manager, Pennsylvania* — "Just a quick note to say that we attended an AECOM Health Care presentation today...It is a complex subject and I think Jennifer did a really good job! Kudos." — *SVP, Colorado* — "Very nice job with the briefing you provided today in Wakefield... It is a complex topic and you made it understandable. I learned a lot myself." — *SVP, Massachusetts* — "...I just wanted to say thanks for making the effort to visit us in person. I think it put people at ease and really showed them that AECOM cares about the employees. Nice work!" — *Manager, Texas*
2. To educate employees and their spouses/ domestic partners about Consumer Driven Health Plans (CDHPs) and drive enrollment migration for those eligible for the wellness plans from the existing high-cost Exclusive Provider Organization (EPO) plan and Preferred Provider Organization (PPOs) plans to AECOM's new CDHP, the Premier Plus Plan. Senior Management's stated goal was to enroll 25% of eligible employees in the new Premier Plus Plan.	**For employees eligible for the wellness medical plans:** • Enrollment in the new Premier Plus Plan was 41% of the eligible employee population, far exceeding senior management's stated goal of 25%. • Enrollment in the wellness EPO plan *decreased* from 64% to 34%. • Enrollment in the wellness PPO1 and PPO2 plans *decreased* from 15% to 10% and from 11% to 10% respectively. **In addition, for non-wellness employees:** • Enrollment in the basic Consumer Driven Health Plan (CDHP), called the Basic HDHP, *increased* from 3% to 15%. • Enrollment in the Basic EPO plan for non-wellness participants *decreased* from 55% to 42%. • Enrollment in the PPO1 plan for non-wellness participants *decreased* from 20% to 18%.
3. To manage health care costs in 2014 and lay the groundwork for reduced health care costs in future years.	These plan migration results immediately saved the company $8.1MM while still enabling family-friendly, cost-effective choices for employees. Projected savings over the next three (3) years is $25MM.
4. To manage the pace and timing of change while maintaining employee satisfaction with their benefits despite the significant changes to their health care program.	AECOM's Annual Global Employee Survey trends key drivers of engagement, including employees' intent to stay with the company. Pay and Benefits is one of the drivers; any adverse reaction to health care reform and subsequent changes to plans or premiums would be revealed through lower survey scores. In the 2013 survey, which was conducted at the end of Open Enrollment, the U.S. Pay and Benefits category score *increased* by 12 points!

Leadership Communications

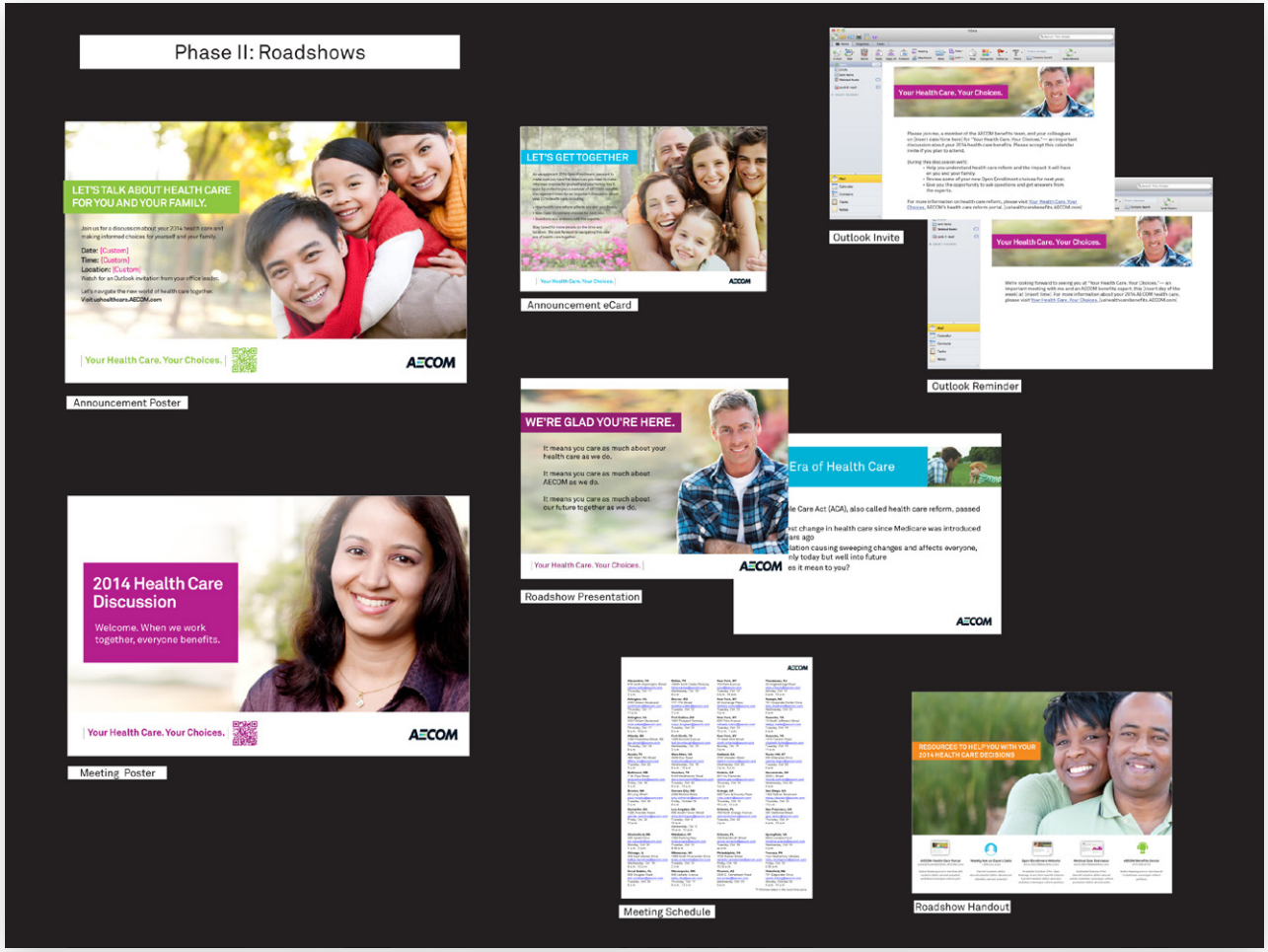
From the beginning, the Corporate Communications team collaborated on the design, development and deployment of the campaign with the leadership group, which included the Chief Human Resources Officer, senior vice presidents in Finance, Tax and Total Rewards, Human Resources (HR) leads in the U.S., site managers, and on-site Champions of Change (office managers and peer influencers).

KEEPING LEADERSHIP IN THE LOOP

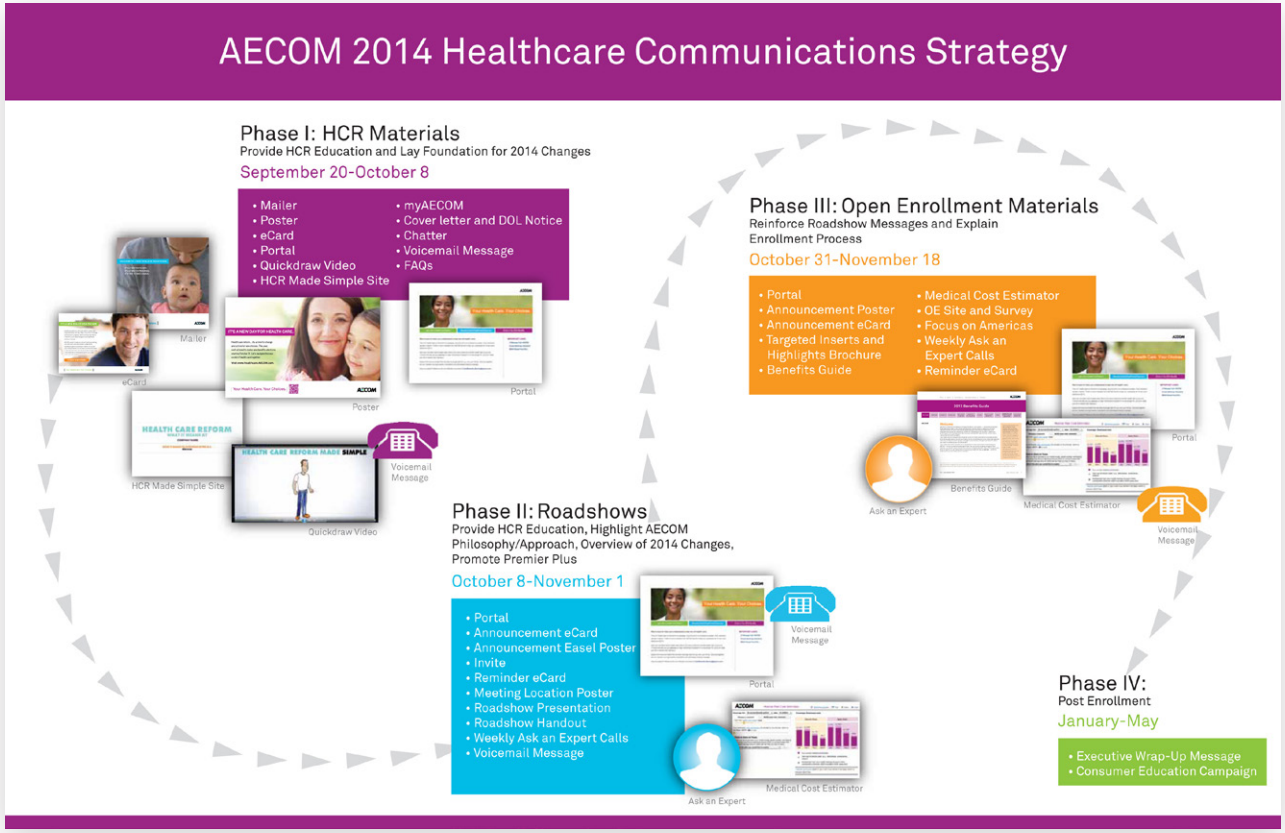
To ensure buy-in, concepts and strategy were presented to the leadership team for feedback early on. In addition, regular presentation meetings and bi-weekly conference calls were held to keep all parties informed and to provide a forum for feedback, wherein messaging was adjusted appropriately to address management and employee concerns or issues.

Health Care Reform and Open Enrollment Materials Presentation Board for Senior Management

Leadership Communications *(continued)*

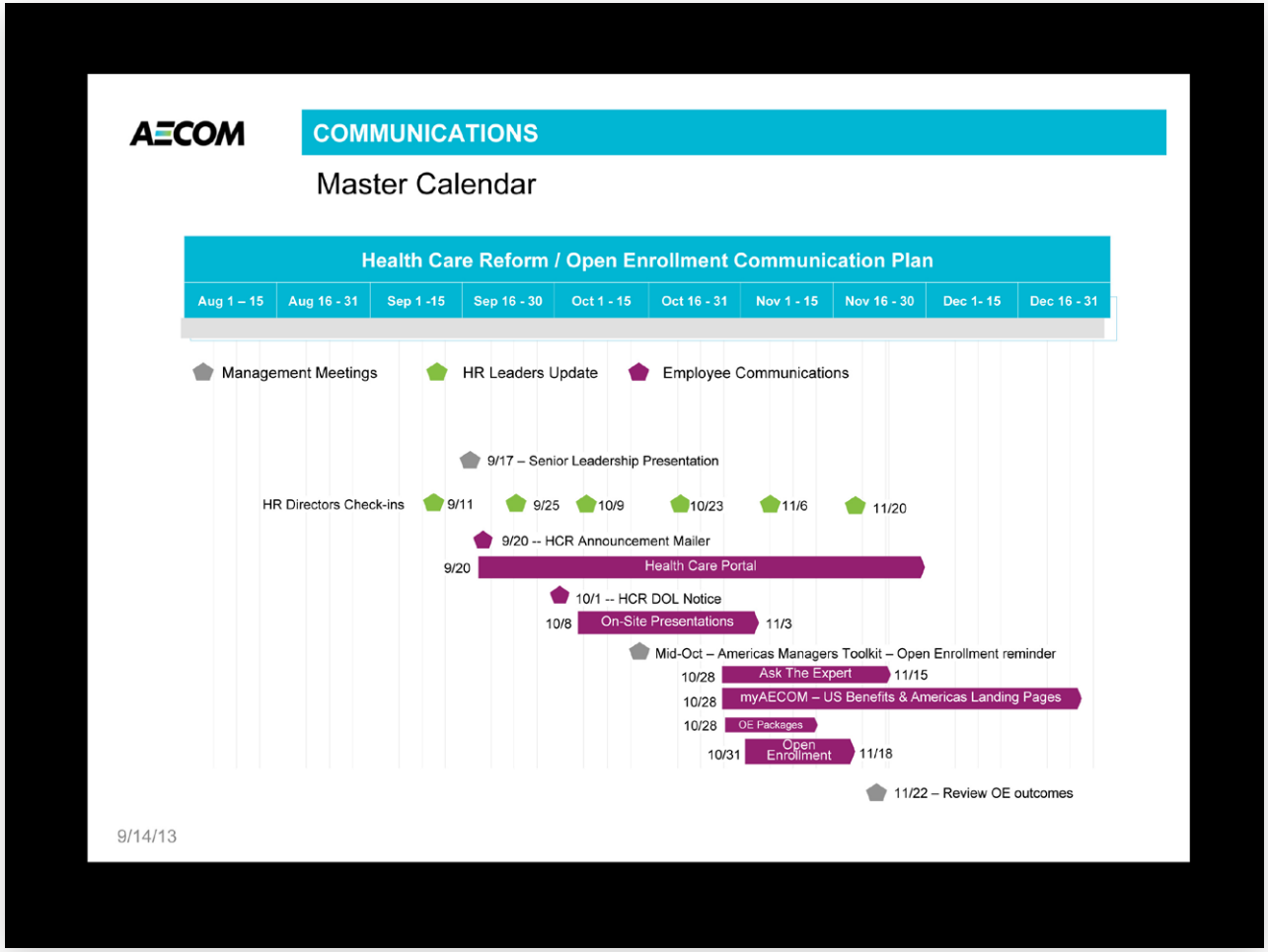


Benefits Roadshow Materials Presentation Board for Senior Management



Communications Strategy and Timeline Presentation Board for All Leadership Groups

Leadership Communications *(continued)*



Calendar Presentation Board for Senior Management

SNEAK PEEKS AND ACTION STEPS

The Benefits Roadshows logistical overview let the Champions of Change know upfront what communication materials they would have at their disposal to promote attendance at the meetings. This document gave them a thumbnail of the item, a brief description, and what action steps they were required to take.

AECOM

2014 Health Care Reform – Office Meetings
Communications/Logistics Overview

Health Care Reform Announcement Poster

- **What It Is:** Poster to announce communications effort, upcoming Open Enrollment and portal URL. PDF of poster will be emailed to office contact.
- **Action Item:** Office contact to print PDF on 11x17 plain paper (not coated/glossy) and post throughout high traffic areas. **(This was sent out from AECOM Human Resources on Friday, September 20, to office contacts throughout the United States. You may or may not have received it; however, we will forward to you to also post as needed.)**
- **Display Date:** As soon as you receive PDF, but no later than September 27.

Meeting Announcement Poster

- **What It Is:** Two customized 30X40 posters to announce your meeting date(s)/time(s). Posters will be shipped to you approximately two weeks prior to your meeting.
- **Action Item:** Insert location details once confirmed and display each one on an easel in high-trafficked areas (entrance, lobby).
- **Display Date:** Approximately two weeks before meetings at your location.

Announcement email

- **What It Is:** General email for employees at locations where meetings will be held.
- **Action Item:** You will be sent the email. Please distribute or work with an office leader (ideally, the individual who would serve as a co-host of this meeting) to distribute the email.
- **Distribution Date**: About two weeks before your meeting
  - Around September 30, if your meeting(s) is scheduled the week of October 7 or 14
  - Around October 7, if your meeting(s) is scheduled the week of October 21 or October 28

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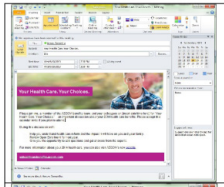
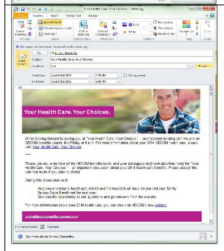


Outlook Invitation

- **What It Is**: Customized Outlook Invitation that invites your employees to attend your meeting. Employees can accept invitation, add it to their calendar.
- **Action Item**: You will be sent the Outlook Invitation in advance. Please distribute or work with the designated office leader to customize the information with the times and dates of your meeting and forward to all employees at your location. **IMPORTANT: Please track interest. If interest seems low, supplement communications to encourage greater attendance.**
- **Distribution Date:** When you think would be most effective to drive traffic to meetings. *Suggested*: At least one week prior to your meeting.



Outlook Reminder

- **What It Is**: Outlook Reminder that reminds your employees to attend your meeting.
- **Action Item**: The person who sent the original Outlook Invitation will want to send out the Outlook Reminder. To do so,
  - Open the original Outlook invitation.
  - Add the Outlook Reminder text (which will be emailed to you) to the top of the page (just below the banner).
  - Separate the Reminder text from the original text by adding a couple blank lines.
  - Customize the information with the times and dates of your meeting.
  - Click on "Send Update" to distribute the reminder.

  IMPORTANT: Please send to ALL employees, not just those that accepted your prior invitation. We want to encourage walk-ins.
- **Distribution Date**: When you think would be most effective to drive traffic to meetings. *Suggested*: 1-2 days prior to your meeting.

2

Benefits Roadshow Logistics for Site Coordinators

Health Care Reform

Health care reform communications set the tone for AECOM's messaging around the new legislation's impact on the company, our commitment to providing valuable benefit plans to our workforce, the need for employee accountability, and the importance of making informed choices.

THE PIECE THAT STARTED IT ALL...

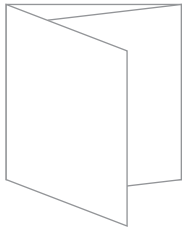
This poster launched the campaign, creating awareness of the changing health care marketplace, open enrollment dates, and the new health care portal. The QR code took users to AECOM's new health care portal at http://ushealthcarebenefits.aecom.com/IABC.

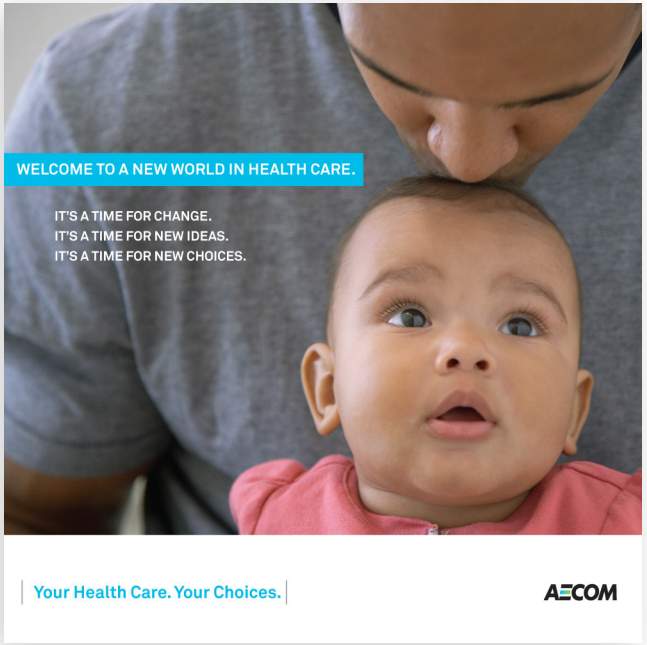
Health Care Reform Poster

Health Care Reform *(continued)*

REACHING OUT TO EMPLOYEES' FAMILIES

The health care reform mailer was the first piece sent to employees' homes that set the calm tone for employees and their spouses/domestic partners about health care reform, and introduced them to the new health care portal.





The world of health care is changing. The Affordable Care Act, also known as health care reform, is the most significant change since Medicare was introduced almost 50 years ago. AECOM is here to help you understand how this new legislation affects you. By staying informed, committing to wellness, and being open to new ideas, we can work together to maintain our top-quality, affordable medical coverage.

UNDERSTANDING A NEW ERA OF HEALTH CARE

Under the Affordable Care Act, there's a new "individual mandate" that requires everyone to have medical coverage starting January 1, 2014.

- **You're covered.** When you elect an AECOM medical plan, you and your family will have met your individual mandate.
- **You've got options.** If you prefer, you can purchase coverage through the new health insurance marketplaces (also called "exchanges"), but you'll likely pay the full cost for coverage.
- **The choice is yours.** Since AECOM's medical plans exceed the law's coverage standards and we pay the majority of the cost, you will more than likely be better off in an AECOM plan.

***Wellness at AECOM* will remain an integral part of our benefits program, playing a key role in building a culture of good health and managing costs.**

- **Wellness is important for all.** The new law promotes wellness and rewards those who take steps to improve or maintain good health, which validates the strategic direction we have taken with *Wellness at AECOM*.
- **It works.** Thanks to your participation, the program has been a huge success — AECOM employees are healthier overall and last year, medical premiums decreased for those who participated in the program.

We all need to become educated consumers of health care, not only when selecting medical coverage, but also when receiving care.

- **Accountability is important for all.** Health care reform encourages responsibility and accountability for individuals by setting new standards for coverage and design.
- **Our obligations.** Employers that don't comply with these limits will face substantial financial penalties in the future. As a result, we're changing our 2014 plans and adding new choices that allow you to take a more active role in your health care.
- **You're in charge.** When you are actively involved in your health care decisions, you improve your ability to receive quality care at more affordable costs.

By making informed decisions, you can greatly impact your overall health care costs.

- **AECOM pays for most of your coverage.** AECOM pays the majority of the expense to provide medical coverage to you and your family.
- **Costs on the rise.** National trends show health care costs increasing 9% to 12% in 2014, so it's important that we work together to monitor and manage our collective spending.
- **New choices, tools on the way.** To help you do this, AECOM will be introducing new health care choices and tools. Your 2014 costs will depend on the choices you make during Open Enrollment, your commitment to wellness and how you use medical services throughout the year.

As AECOM adapts to this new law, we remain committed to you.

- **We're in this together.** Wherever this journey takes us, we are committed to meeting your needs and those of your family with a competitive benefits package that recognizes your valuable contribution to AECOM.

This year, it's more important than ever to understand your choices for 2014.

As a result, we'll be asking everyone to make new benefits elections during Open Enrollment (October 31–November 18). These decisions will affect your care and your costs next year. AECOM will provide the tools and resources necessary to help you carefully consider your options, including:

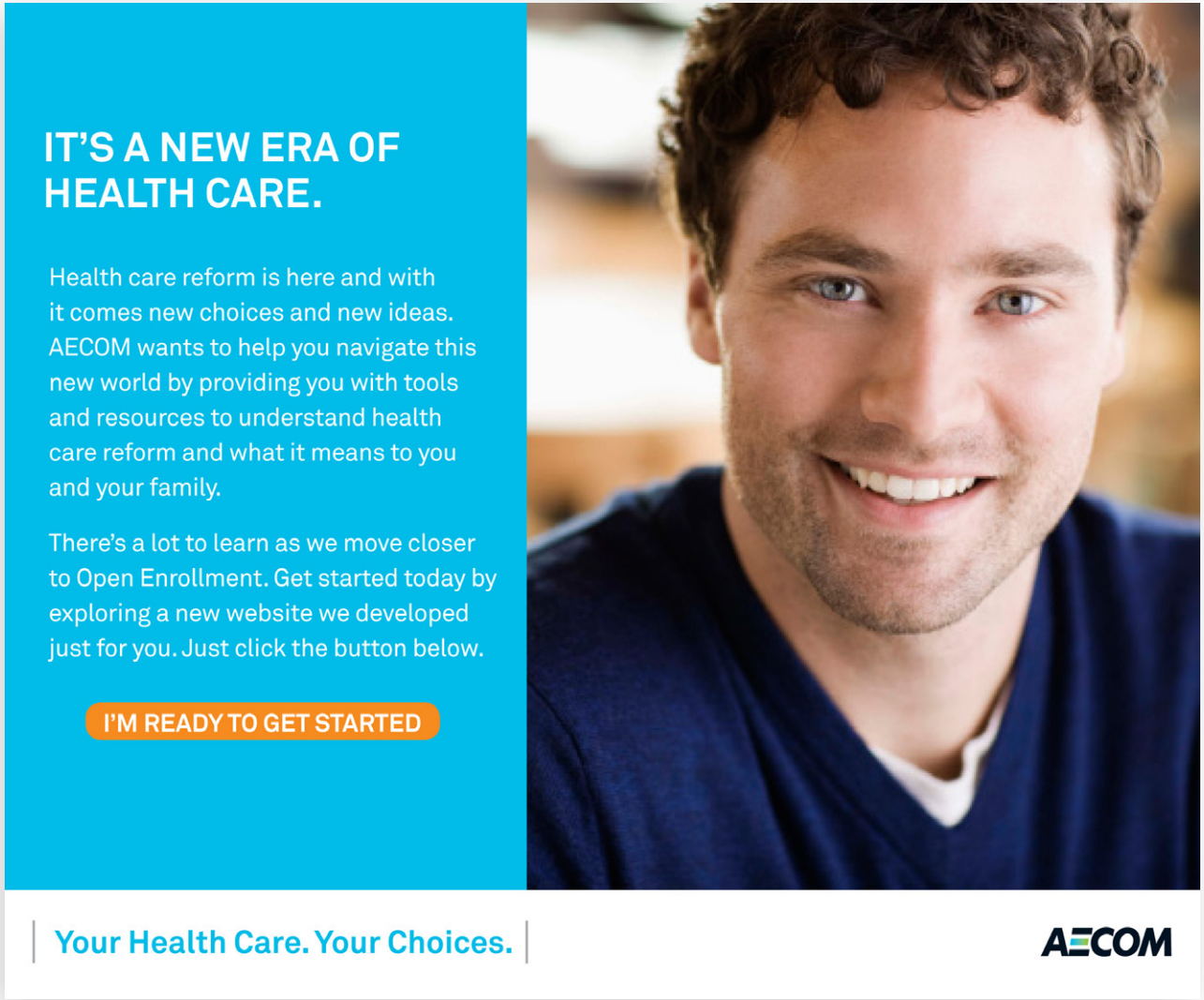
- A new website called "Your Health Care. Your Choices." at **ushealthcarebenefits.AECOM.com** — visit today.
- Employee meetings at various AECOM locations.
- Open Enrollment materials mailed to your home.
- The ability to enroll online.

Health Care Reform Mailer

Health Care Reform *(continued)*

DRIVING EMPLOYEES TO THE HEALTH CARE PORTAL

eCards were emailed to employees throughout the campaign. This one kicked off the health care reform campaign, piqued interest in health care reform, and directed employees to click a button that took them to AECOM's health care portal, where they could learn more.

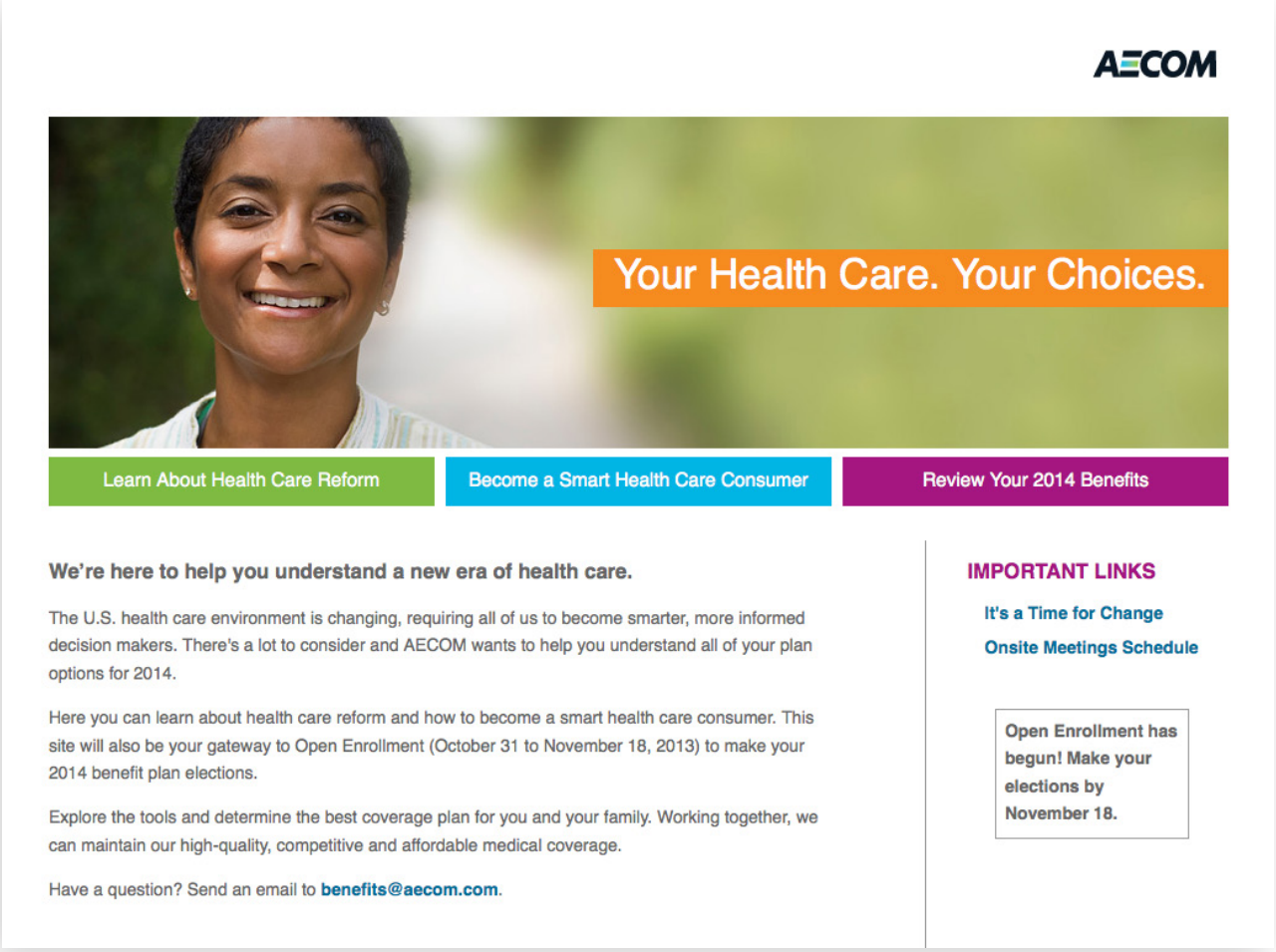


Health Care Reform eCard

Health Care Reform *(continued)*

GATEWAY TO HEALTH CARE

The AECOM health care portal was the resource for employees to access to learn all they needed to know about health care reform, open enrollment, the benefits roadshows, health care consumerism, and more. When the site was first launched, its main focus was health care reform. As the campaign evolved, so did the website, and information and resources were added as we got closer to open enrollment. To access the site for judging purposes, please visit http://ushealthcarebenefits.aecom.com/IABC.



Health Care Portal

Health Care Reform *(continued)*

UNDERSTANDING HEALTH CARE REFORM

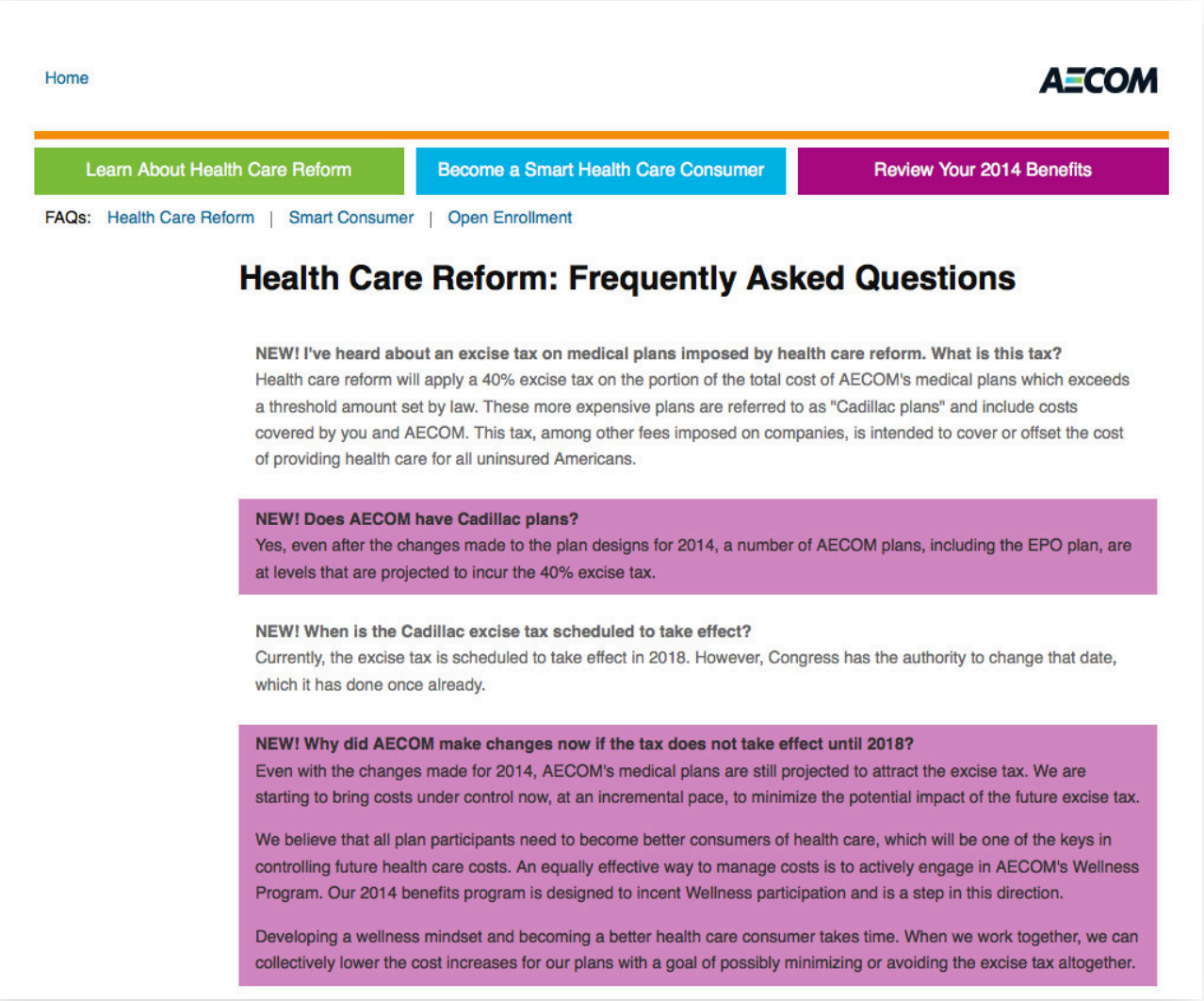
Employees could easily access the health care reform website by clicking on "Learn About Health Care Reform" from the AECOM health care portal, or by visiting the site directly. Through text and video, employees could click to learn more about health care reform, definitions of key terms, and FAQs. The site logged more than 16,000 visits during the campaign. To access the site for judging purposes, please visit http://aecom.hcrmadesimple.com/SitePages/aecom.aspx. Password is "reform."

Health Care Reform Site

Health Care Reform *(continued)*

MAINTAINING THE DIALOGUE

FAQs were posted on the health care portal and on myAECOM, AECOM's intranet site. The FAQs were updated throughout the campaign to address employee and management questions.



Home

AECOM

Learn About Health Care Reform | Become a Smart Health Care Consumer | Review Your 2014 Benefits

FAQs: Health Care Reform | Smart Consumer | Open Enrollment

Health Care Reform: Frequently Asked Questions

NEW! I've heard about an excise tax on medical plans imposed by health care reform. What is this tax?
Health care reform will apply a 40% excise tax on the portion of the total cost of AECOM's medical plans which exceeds a threshold amount set by law. These more expensive plans are referred to as "Cadillac plans" and include costs covered by you and AECOM. This tax, among other fees imposed on companies, is intended to cover or offset the cost of providing health care for all uninsured Americans.

NEW! Does AECOM have Cadillac plans?
Yes, even after the changes made to the plan designs for 2014, a number of AECOM plans, including the EPO plan, are at levels that are projected to incur the 40% excise tax.

NEW! When is the Cadillac excise tax scheduled to take effect?
Currently, the excise tax is scheduled to take effect in 2018. However, Congress has the authority to change that date, which it has done once already.

NEW! Why did AECOM make changes now if the tax does not take effect until 2018?
Even with the changes made for 2014, AECOM's medical plans are still projected to attract the excise tax. We are starting to bring costs under control now, at an incremental pace, to minimize the potential impact of the future excise tax.

We believe that all plan participants need to become better consumers of health care, which will be one of the keys in controlling future health care costs. An equally effective way to manage costs is to actively engage in AECOM's Wellness Program. Our 2014 benefits program is designed to incent Wellness participation and is a step in this direction.

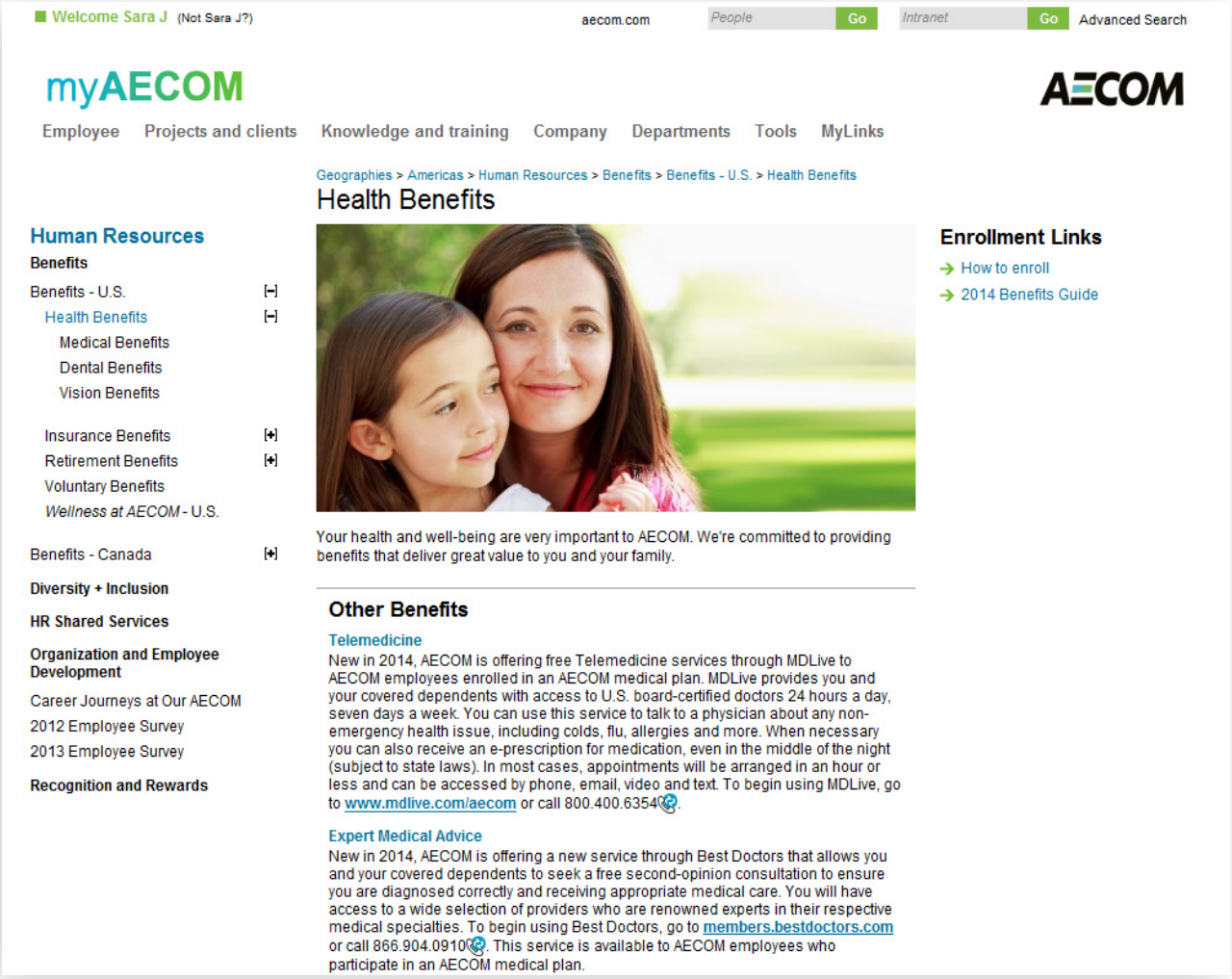
Developing a wellness mindset and becoming a better health care consumer takes time. When we work together, we can collectively lower the cost increases for our plans with a goal of possibly minimizing or avoiding the excise tax altogether.

FAQs

Health Care Reform *(continued)*

KEEPING INFORMATION ACCESSIBLE

Employees could easily access health care reform and enrollment information on AECOM's intranet, myAECOM.

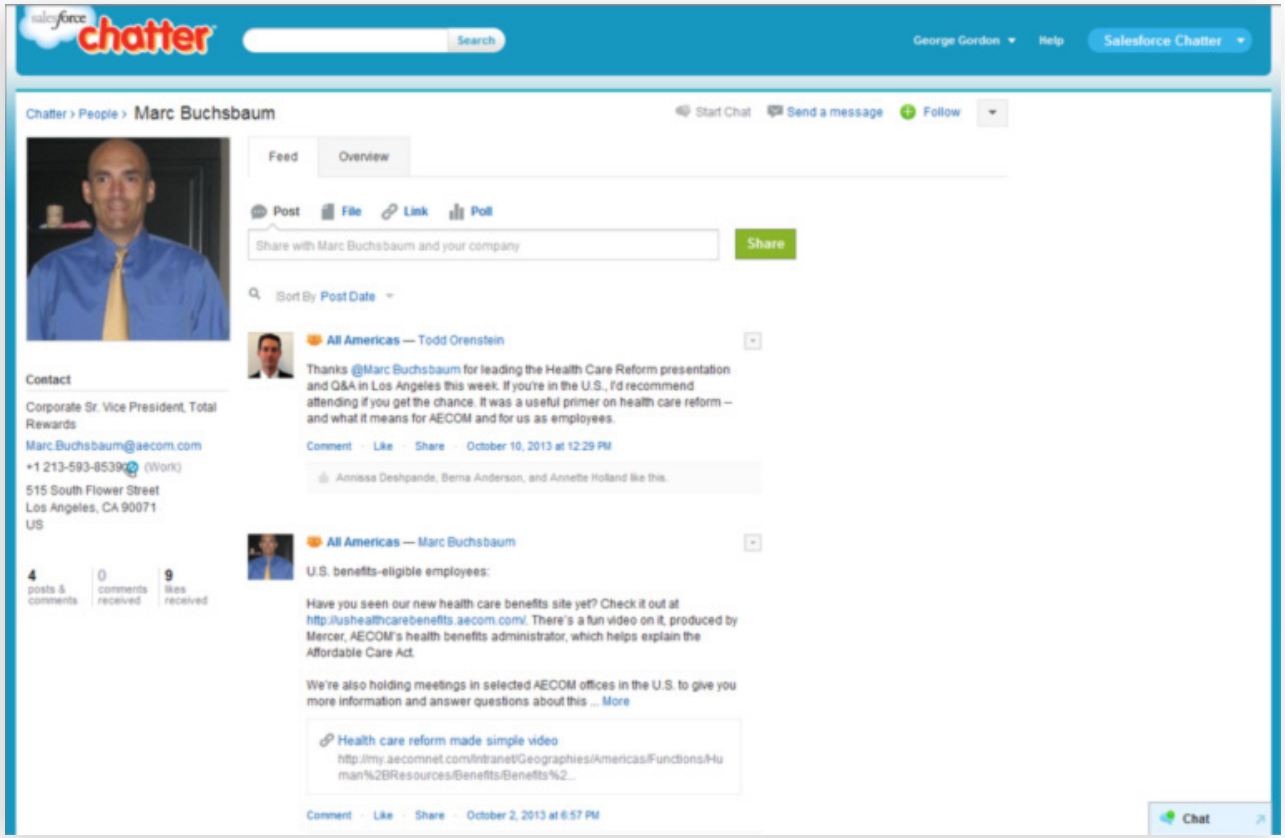


Benefits Page on myAECOM (AECOM Intranet)

Health Care Reform *(continued)*

NETWORKING WITH EMPLOYEES

Chatter is AECOM's internal social networking platform. Throughout the campaign, senior management used Chatter to quell employee concerns and send out benefits information. In the post below, Marc Buchsbaum, senior vice president of Total Rewards, encourages employees to visit the health care portal.



Chatter

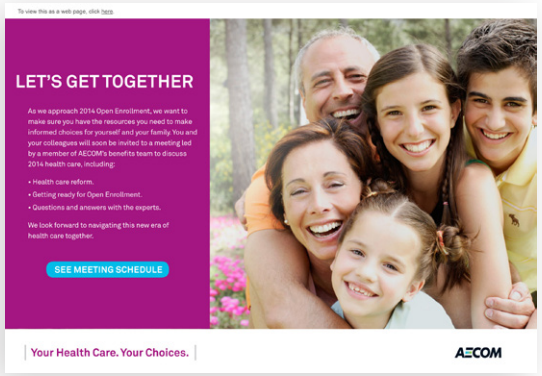
Benefits Roadshows

The Benefits Roadshows were an opportunity to deliver our messages and address any employee concerns in a face-to-face setting. While conducting meetings in 65 locations across the country was a massive undertaking, the results were worth it: it ensured key messages were communicated to and understood by employees, and employees greatly appreciated the effort and the chance to learn about the benefits changes firsthand.

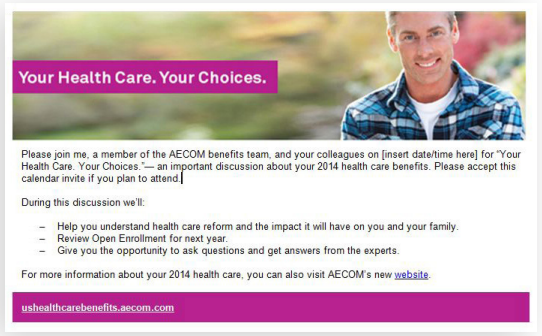
TAKING THE MESSAGE ON THE ROAD

Promotion of the Benefits Roadshows took many forms. An eCard announced the roadshows and linked to a roadshow meeting schedule on the health care portal. The invitation was customizable by the local office managers, as was the eCard reminding employees to attend. Posters were used to announce the Roadshow and also to direct employees to the specific meeting location.

In addition, corporate benefits staff was in constant communication with location site managers where roadshows were being held, to learn of specific employee concerns at each location, and to manage logistics.



Announcement eCard



Invitation eCard

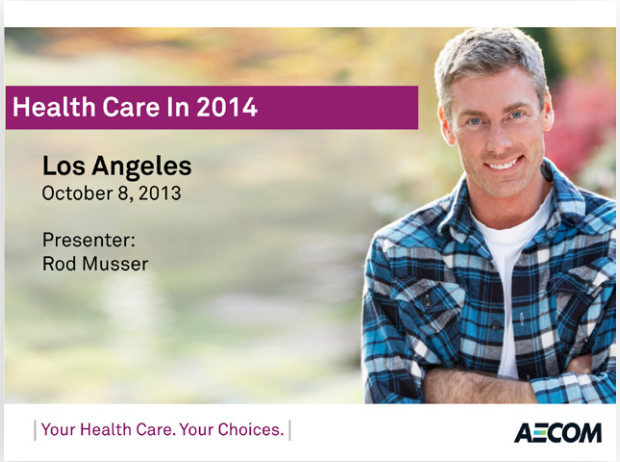
Announcement Poster

Meeting Location Poster

Benefits Roadshows *(continued)*

GETTING FACE-TO-FACE

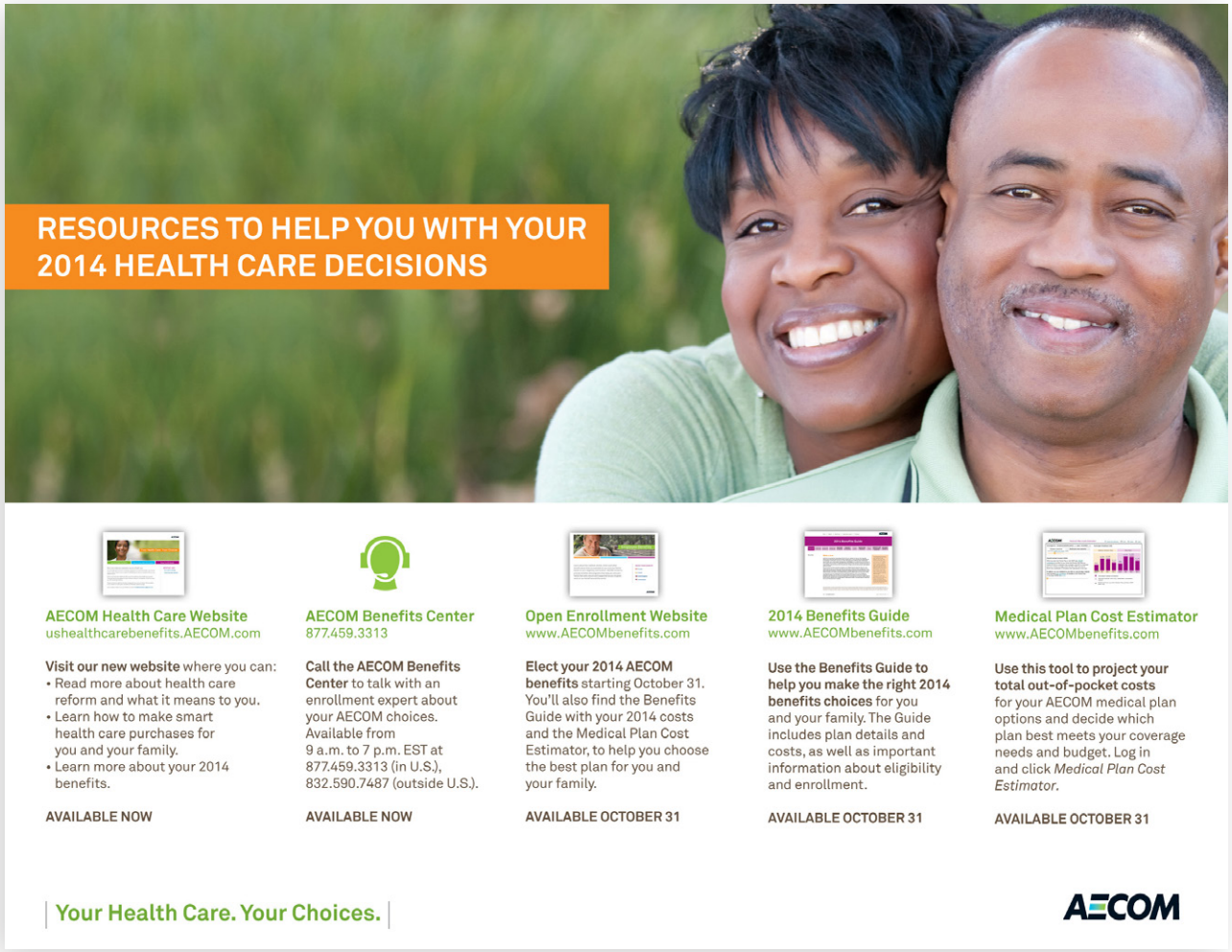
The 20-minute PowerPoint deck was delivered to employees by a Corporate HR representative and the onsite Champion of Change and ended with a Q&A session. Employees who missed the session could view a Brainshark of the meeting presentation on the health care portal. The Brainshark can be viewed at http://ushealthcarebenefits.aecom.com/IABC/review.html.



Benefits Roadshow Presentation

PROMOTING TOOLS AND RESOURCES

This handout was given to all who attended the Benefits Roadshows and directed them to new tools and resources to learn more, calculate their costs, and enroll. Included on this handout was the number for the AECOM Benefits Center, providing employees an opportunity to talk with a live benefits expert.



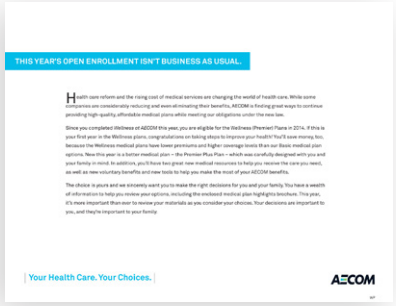
Benefits Roadshow Handout

Open Enrollment

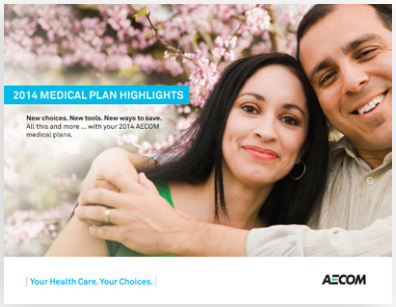
Open Enrollment was held from October 31 to November 18, 2013. This was an active enrollment, meaning that all employees needed to make elections to have coverage on January 1, 2014 or be placed into default coverage.

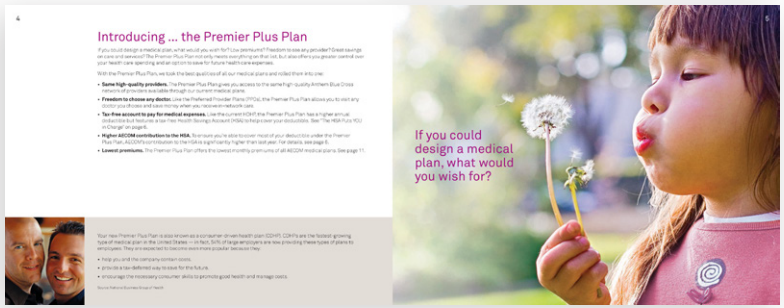
TARGETING THE MESSAGE

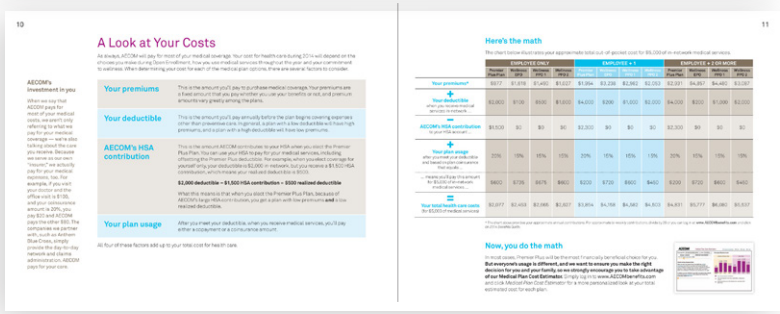
The targeted enrollment packet was mailed to employees' homes. There were two versions: one targeted to those who completed *Wellness at AECOM* (and qualified for the Premier Plus Plan) and one for those who did not. The packet explained AECOM's health care options, encouraged employees to consider their personal health care spending, and urged them to calculate their personal costs.



Targeted Open Enrollment Letter





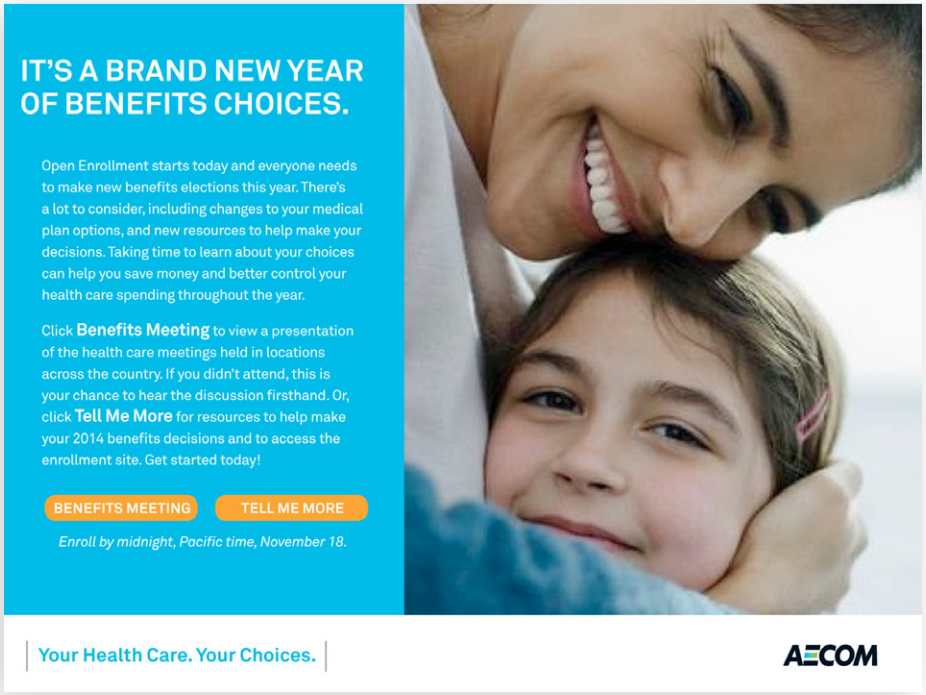


Targeted Open Enrollment Packet

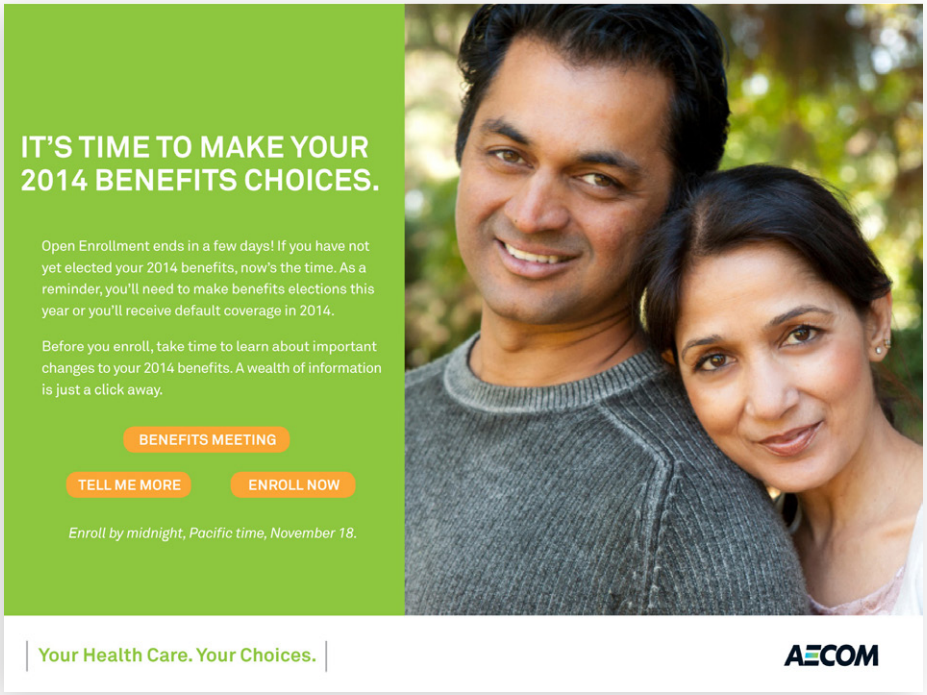
Open Enrollment *(continued)*

ANNOUNCEMENTS AND REMINDERS

eCards were used again to launch Open Enrollment and later to remind employees to enroll before the November 18 deadline. The announcement eCard linked to a Brainshark of the Benefits Roadshow presentation and to the portal, where employees could get more information about health care reform, health care consumerism, and link through to the open enrollment website. The reminder eCard also linked to the Brainshark presentation, the health care portal, and directly to the open enrollment website.



Announcement eCard

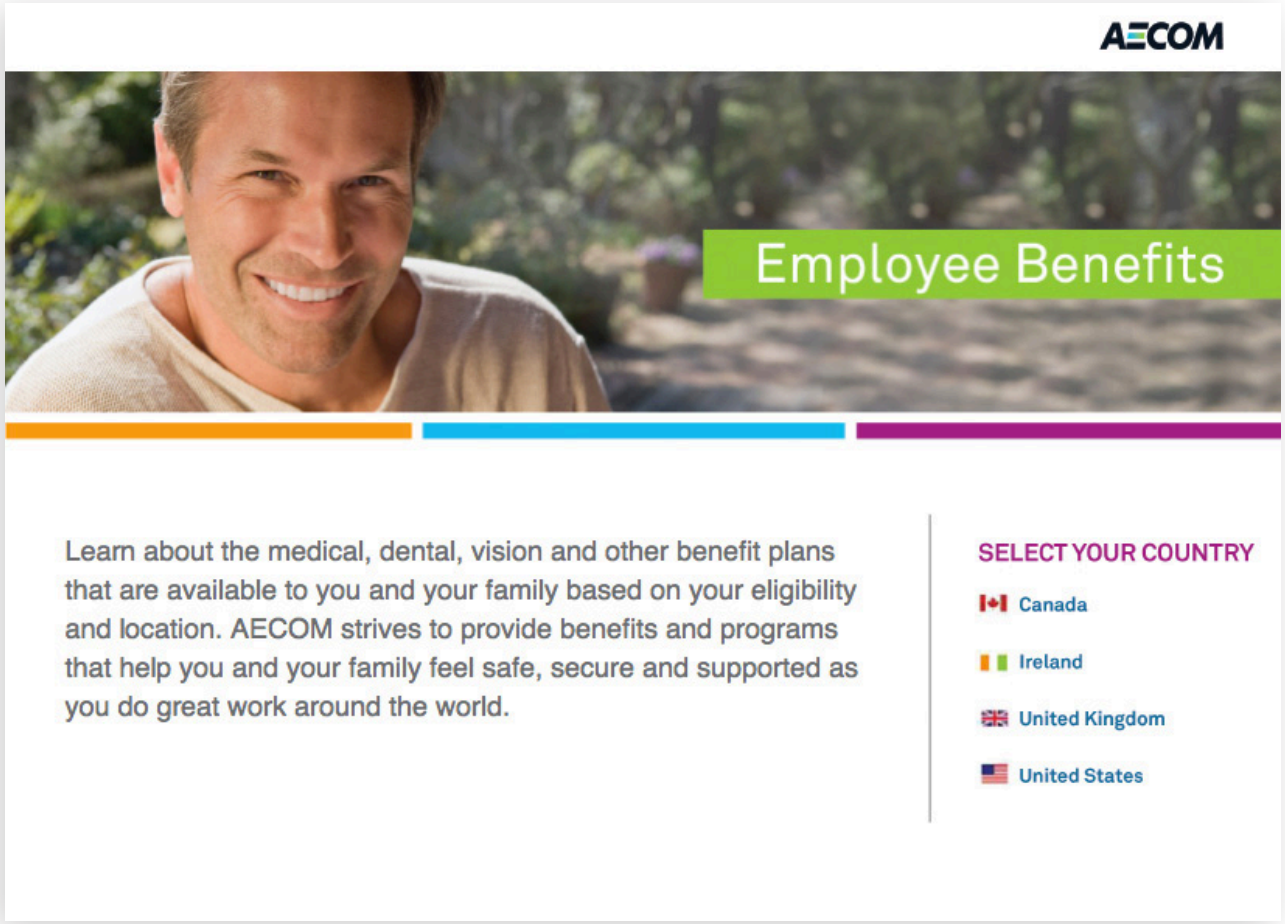


Reminder eCard

Open Enrollment *(continued)*

TIME TO ENROLL

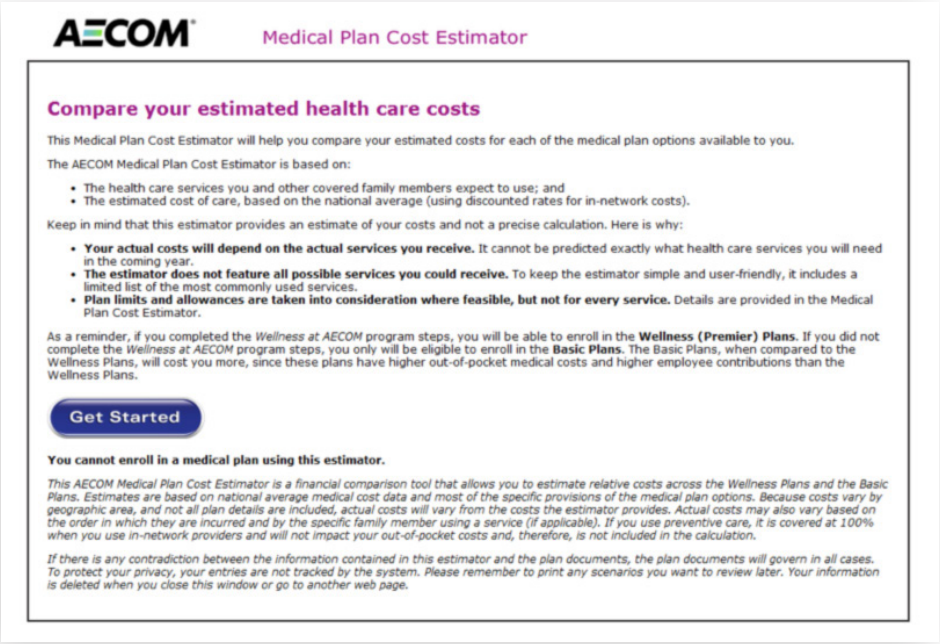
The Open Enrollment website was a vehicle to enroll for 2014 benefits and also provided tools and information including the Medical Cost Estimator and the Benefits Guide. Access to the enrollment site was made easy: employees could link to it through the health care portal, the intranet site myAECOM, through the eCards they received, or directly via the URL at www.AECOMbenefits.com.

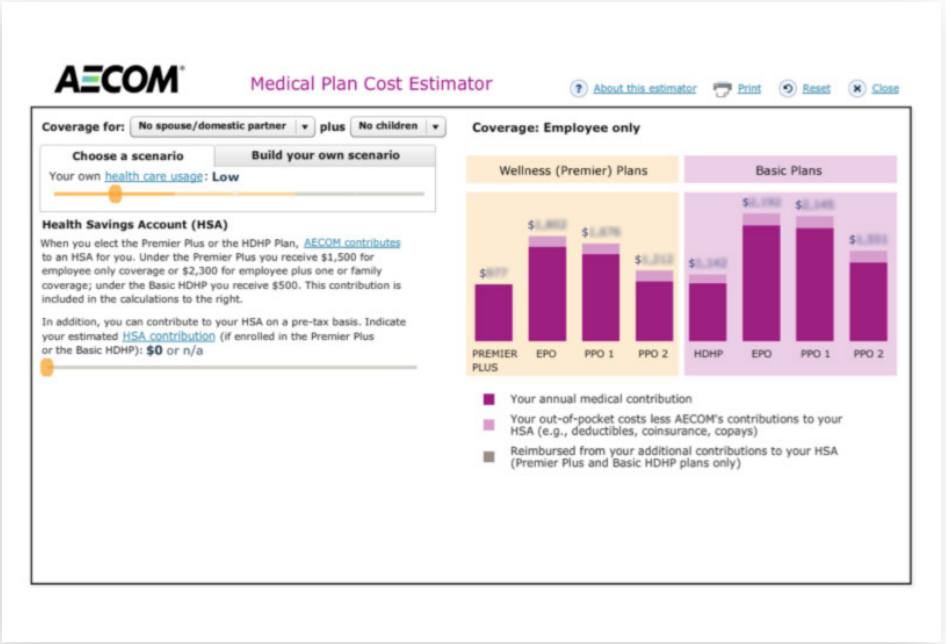


Open Enrollment Website

CALCULATING THE COST

This tool was available to employees after they logged into the enrollment website at www.AECOMbenefits.com. It helped them project their total out-of-pocket costs for the various AECOM medical plan options to decide which medical plan was best for them.

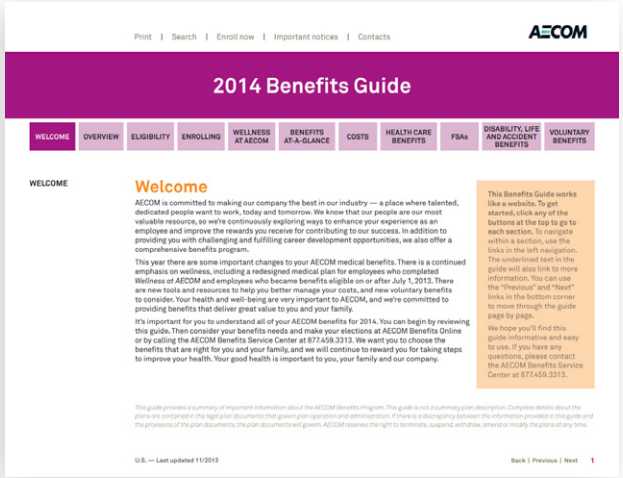


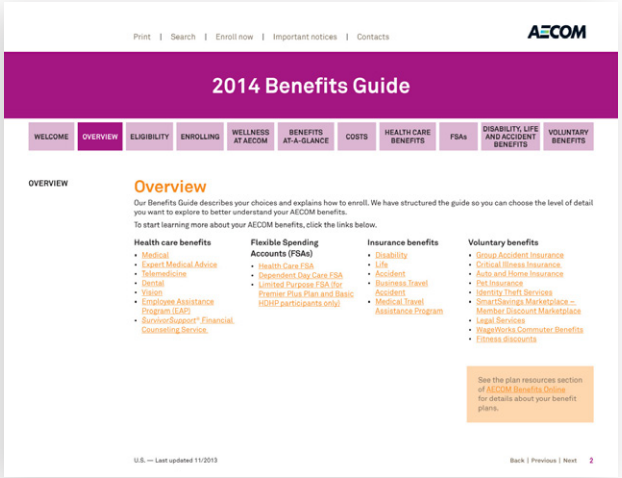


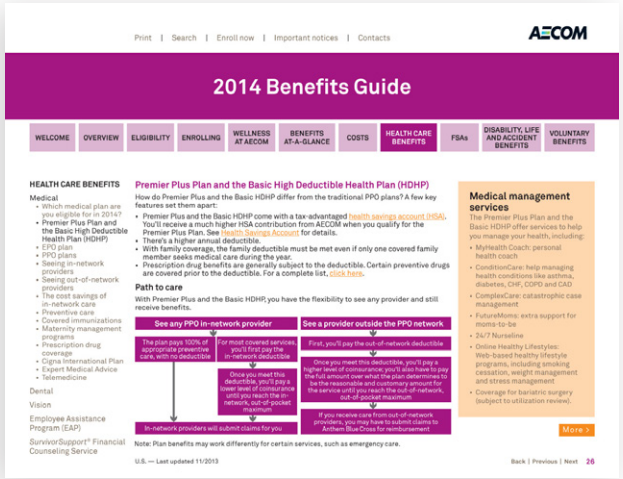
Medical Plan Cost Estimator

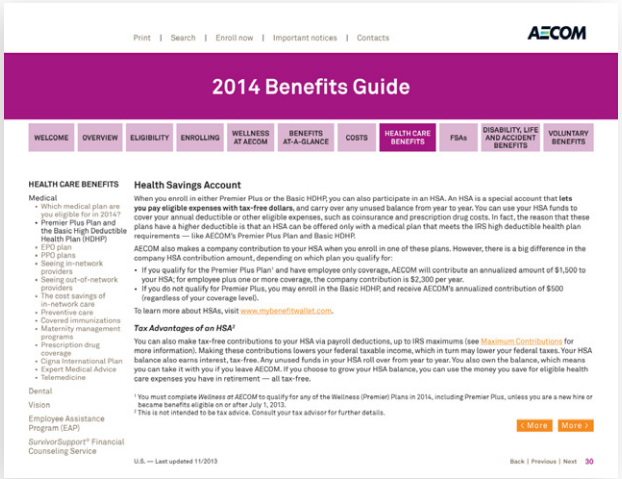
ALL THE DETAILS AT THE CLICK OF A MOUSE

The comprehensive Benefits Guide is an interactive PDF that enables employees to jump easily from one topic to the next. The guide was posted on the enrollment website at www.AECOMbenefits.com and on myAECOM, and includes loads of information on all AECOM benefits. The Health Care benefits section provides high-level health plan comparisons, plan summaries, and details about the Health Savings Account.









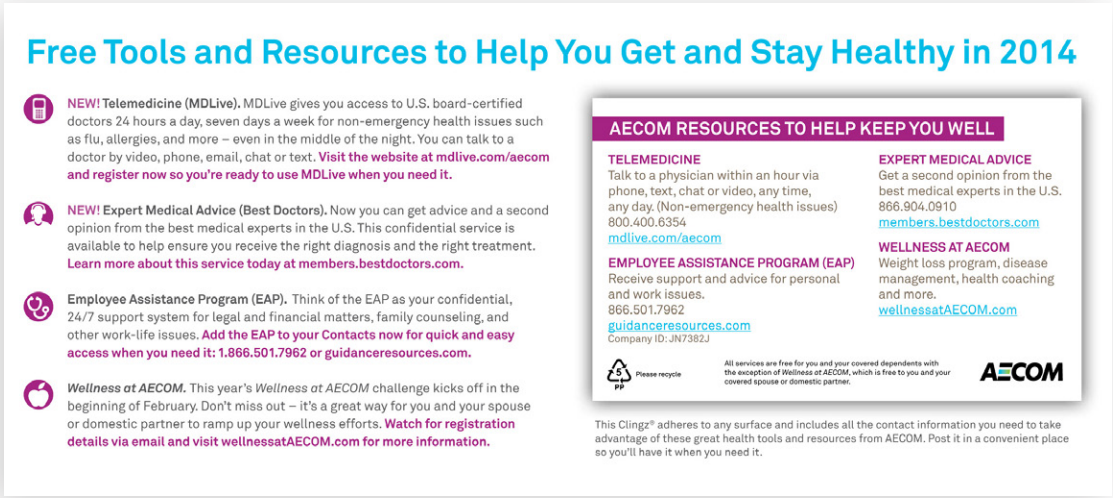
Benefits Guide

Open Enrollment *(continued)*

RESOURCES TO START THE YEAR OUT RIGHT

A mailing right after the first of the year was sent to employees to remind them of the new tools, resources and programs available to help them make smart, informed health care decisions during 2014. The mailer included a static cling (called a Clingz) that employees could affix to any surface, as well as additional information from the various new programs.

Clingz



Post Enrollment New Year's Mailing