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Office of Privacy and Disclosure
617 Altmeyer Building
6401 Security Boulevard
Baltimore, Maryland 21235
[Online FOIA Request Form](#)

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SOCIAL SECURITY

Refer to:
S9H: AM6234

October 24, 2014

I am responding to your August 17, 2014 Freedom of Information Act request for a copy of the recent Social Security Administration Communications plan.

I am enclosing a copy of the information as you requested. I hope this information is helpful.

If you disagree with this decision, you may request a review. Mail your appeal within 30 days after you receive this letter to the Executive Director for the Office of Privacy and Disclosure, Social Security Administration, 6401 Security Boulevard, Baltimore, Maryland 21235. Mark the envelope "Freedom of Information Appeal."

Sincerely,

Dawn S. Wiggins
Freedom of Information Officer

2012 NATIONAL COMMUNICATIONS PLAN SUMMARY

Tactical Plans for each Communications Objective are published separately.

AGENCY STRATEGIC PLAN GOALS	COMMUNICATIONS OBJECTIVES	GENERAL MESSAGES	MEASUREMENTS
<p>Goal 1 - Eliminate our hearings backlog and prevent its recurrence</p>	<p>Inform the public of the actions we take to reduce the backlog and prevent its recurrence.</p>	<p>We are increasing our capacity to hear and decide cases, and improving the way we manage the hearings process.</p>	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Feedback from public, stakeholders and advocacy groups.</p>
<p>Goal 2 - Improve the speed and quality of our disability process</p>	<p>2A: Inform the public about the Social Security disability program and the efforts underway to improve the disability process –</p> <ol style="list-style-type: none"> 1. Market online disability applications and appeals to increase online filing 2. Inform the public about QDD (Quick Disability Determination) and Compassionate Allowances initiatives; 3. Inform claimants and third parties to ensure they are prepared for the disability process. 	<p>We are committed to improving the disability process to make it as fair and timely as possible –</p> <ol style="list-style-type: none"> 1. Apply for disability benefits online. If needed, you also can file your appeal online; 2. We are committed to providing benefits quickly to applicants who obviously meet our disability standards; 3. Claimants and those who assist them can help by being more prepared for the disability process. 	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Feedback from public, stakeholders and advocacy groups.</p> <p>Track website visits, application usage, and other metrics.</p> <p>Test our printed and online communications materials on these subjects to assess if the objectives are being achieved.</p>
	<p>2B: Support Health IT initiatives while continuing efforts to promote Electronic Records Express (ERE).</p>	<ol style="list-style-type: none"> 1. Health IT will improve the speed and consistency of Social Security's disability determinations. The faster we can make disability determinations, the 	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Feedback from public, stakeholders and advocacy groups.</p>

		<p>faster we can start payments to individuals with disabilities.</p> <p>2. Save time and money. Use ERE to submit [fill in - medical/school/client] records to Social Security.</p>	<p>Track web site visits, application usage, and other metrics such as Medical Evidence of Record (MER) percentage and ERE utilization metrics.</p>
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<p>Goal 3 - Improve our retiree and other core services</p>	<p>3A: Market Social Security's Suite of Online Services.</p>	<p>1. Go to socialsecurity.gov. It's So Easy!</p> <p>2. If you are not comfortable with the Internet, ask someone you trust to help you.</p>	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Track retirement application usage, website visits and other metrics associated with the Online Services promotional campaign.</p> <p>Remain in regular contact with OQP and ORES regarding studies to stay ahead of trends and usage patterns.</p> <p>Track PSA plays.</p> <p>Search marketing analysis.</p>
	<p>3B: Market Social Security's website, Online Services, and Automated 800-number services to inform the public of available information and electronic services.</p>	<p>1. Save a trip! Visit www.socialsecurity.gov to find information and services you can use.</p> <p>2. Save a trip! Call Social Security at 1-800-772-1213 and use our automated services – anytime, day or night!</p>	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Track website visits.</p> <p>Track online service usage.</p> <p>Track 800-number automated services usage.</p> <p>Track PSA plays.</p>

			Search marketing analysis.
	3C: Support Medicare Extra Help Outreach by informing the public of the program and the changes as a result of Medicare Improvements for Patients and Providers Act (MIPPA) and the Affordable Care Act.	1. It's easier than ever to save on prescription costs – Apply Now! (Mother's Day & Father's Day messaging & promotion – TBD)	Agreed-to tactical plans/activities are executed on time and on budget. Track number of applications (paper and online).
	3D: Market Social Security's new Spanish-language Retirement Estimator (S-RE).	(Spanish-Retirement Estimator message TBD)	Agreed-to tactical plans/activities are executed on time and on budget. Remain in regular contact with OQP and ORES regarding studies to stay ahead of trends and usage patterns. Feedback from public stakeholders and advocacy groups. Track usage of S-RE application.
	3E: Market Social Security's Direct Deposit/Direct Express payment option.	Go Direct!	Agreed-to tactical plans/activities are executed on time and on budget. Track PSA plays.

Goal 4 - Preserve the public's trust in our programs	4A: Inform the public of the need to protect their Social Security Number and card.	Protect your Social Security Number and card. Keep your card in a safe place and do not give out your Social Security Number unnecessarily.	Agreed-to tactical plans/activities are executed on time and on budget. Feedback from public, stakeholders and advocacy groups.
	4B: Remind the public about our Online Security Measures.	We protect the information we collect and maintain about you.	Agreed-to tactical plans/activities are executed on time and on budget

			Feedback from public, stakeholders and advocacy groups.
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Special initiative – Encourage Saving	<p>Inform the public of the role of savings in their lives and the need for sound financial planning.</p> <p>Help promote activities related to the Financial Literacy Education Commission (FLEC) and MyMoney.gov</p>	Planning for your financial future is important. Social Security has information and tools you can use.	<p>Agreed-to tactical plans/activities are executed on time and on budget.</p> <p>Track usage of online tools.</p> <p>Test any new products developed to meet this objective.</p>
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Key foundational element – Employees	<p>Support agency efforts to provide an environment and culture that fosters employee retention, promotes achievement in public service, and encourages the pursuit of personal excellence –</p> <p>A) Keep employees informed of the Commissioner’s priorities and messages;</p> <p>B) Support internal communications activities.</p>	Our employees are the foundation of the agency and our most valuable asset for providing the service the public expects and deserves.	<p>Agreed-to activities are executed on time and on budget</p> <p>Feedback from employees and stakeholders</p> <p>Continue work with DCHR on Employee Satisfaction and similar research projects</p>
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Key foundational element – Information Technology	Support agency objectives to modernize our information technology infrastructure.	Technology is the foundation of our ability to provide services to the public.	<p>Agreed-to tactical plans/activities are executed on time and on budget</p> <p>Feedback from Congress, public, employees, stakeholders and advocacy groups.</p>
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**Tactical Communications Plan 1 to support
Agency Strategic Plan Goal 1:
Eliminate our hearings backlog and prevent its recurrence**

Communications Objective 1: Inform the public of the actions we take to eliminate the backlog and prevent its recurrence.

General Message: We are increasing our capacity to hear and decide cases, and improving the way we manage the hearings process.

Audiences:

- Persons who may be eligible for disability benefits and their spouses/families
- Persons who have applied for benefits
- Third parties who assist claimants (including Attorneys, Appointed Representatives)
- Targeted governmental agencies
- Disability advocacy organizations and other organizations with special interests in the Social Security disability program

Offices: OCOMM and Operations

Tactics/Activities:

Office of Communications Planning and Technology (OCPT) –

- Provide talking points and PowerPoint presentations for Public Affairs Specialists
- Update relevant web pages
- Provide Monthly Information Package (MIP) articles
- Support openings of Hearing Centers

Office of External Affairs (OEA) –

- Maintain relationships with disability advocacy organizations and other organizations with special interests in the Social Security disability program
- Support efforts by Operations (OES) and ODAR to increase access to the electronic folder for these cases at the hearings level
- Post articles in trade magazines and newsletters as milestones are achieved

Press Office –

- Issue news release(s) as milestones are achieved: e.g., hiring of ALJs; opening of Hearing Centers
- Arrange news media interviews when appropriate
- Develop fact sheet(s) as needed
- Respond to news media inquiries

Office of Public Inquiries (OPI) – Obtain and disseminate language via online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- When appropriate, distribute news releases, arrange media interviews and respond to news media inquiries
- Affected Regions: Publicize openings of Hearing Centers
 - When a new office opens, highlight the effect it will have on the local economy, how that new office will help reduce decision wait times and eliminate the hearings backlog

- Highlight the number of new jobs, Hearing Center capacity, and expected productivity outcomes

Tools:

- News releases, when issued
- Relevant Social Security website pages
- MIP articles
- Publications (standard and alternate formats)
- Talking points and PowerPoint presentations for Public Affairs Specialists
- *Social Security Update* articles

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Feedback from public, stakeholders and advocacy group

**Tactical Communications Plan 2A to support
Agency Strategic Plan Goal 2:
Improve the speed and quality of our disability process**

Communications Objective 2A: Inform the public about the Social Security disability program and the efforts underway to improve the disability process –

- 1) Market online disability applications and appeals to increase online filing;
- 2) Inform the public about Quick Disability Determination (QDD) and Compassionate Allowances initiatives;
- 3) Inform claimants and third parties to ensure they are prepared for the disability process.

General Messages: We are committed to improving the disability process to make it as fair and timely as possible –

1. Apply for disability benefits online. If needed, you also can file your appeal online;
2. We are committed to providing benefits quickly to applicants who obviously meet our disability standards;
3. Claimants and those who assist them can help by being more prepared for the disability process.

Audiences:

- Persons who may be eligible for disability benefits and their spouses/families
- Persons who have applied for benefits and want to appeal a decision
- Third parties who assist claimants (including Attorneys, Appointed Representatives)
- Targeted governmental agencies
- Disability advocacy organizations and other organizations with special interests in the Social Security disability program

Offices: OCOMM and Operations

Tactics/Activities:

OCPT -

- Develop national Webinar for third parties (primarily) on filing and appealing online, working with OEA, ODAR and other components
- Support national webcasts of Compassionate Allowances hearings as requested by COSS and ODP
- Maintain website (www.socialsecurity.gov)
 - Continue to host Compassionate Allowances webcasts after the live event
 - Update the "What You Can Do Online" Internet page as needed
 - Update selected FAQs to include information on iAppeals as needed
- Update and distribute banners to other websites as needed
- Media products and activities
 - Continue developing short summary videos of Compassionate Allowances hearings; post on appropriate social media
 - Prepare Monthly Information Package articles and radio spots that focus on disability online filing and appeals and distribute to local media outlets
- Develop materials for use by Public Affairs Specialists and other employees participating in outreach
 - Update PowerPoint presentation that can be used at public events
 - Create audio-visual/508-compliant training presentation on Internet Disability and on iAppeals and how to file
 - Update talking points for outreach and media activities

- As needed, update publications describing basic concepts of iAppeals, and detailed instructions on how to file online
- Create updated informational materials for placement in national trade/organizational publications and training packages
- Produce online fact sheets/desk guides for rep payee organizations (nursing homes, group homes, hospices, etc)
- Public and Employee education
 - Add selected disability information to digital signage (SSTV) content
 - Update and distribute posters, banner-ups, etc., for field offices to remind public and employees to use online services

OEA –

- Help prepare and then promote Webinar
- Promote messages and distribute materials to target audiences at seminars, conferences and meetings of national organizations and targeted Federal agencies
- Provide feature articles for newsletters of large companies, national organizations, and adult living/retirement communities
- Dear Colleague letter to third parties
- Develop and strengthen partnerships with national disability and advocacy organizations
 - Participate in national conferences and meetings
 - Conduct workshops
 - Moderate panels
 - Exhibit
- Conduct mailing campaigns for specific events; i.e., National Disability Month, Americans with Disability Act (ADA) Anniversary
- Encourage organizations to link to the Social Security website
- Convene roundtable discussions/workgroups
- Help prepare and then promote Compassionate Allowance hearings to appropriate audiences
- Encourage participation through tribal consultation with the American Indians/Alaska Native community
- Evaluate Webinar

Press Office –

- Issue news release(s) as milestones are achieved
- Arrange news media interviews when appropriate
- Develop fact sheet(s) as needed
- Respond to news media inquiries

OPI – Obtain and disseminate language via online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Promote participation in Webinar
- Support and promote the formation of eCouncils or eService workgroups composed of frontline employees and managers to share best practices for promoting SSA's Online Services
- Develop state-specific press release to update quick disability decision (QDD) process in Areas throughout the Region
- Conduct outreach events region-wide in conjunction with state DDSs
- Inform about materials as needed (includes stuffer/flier; audience-oriented pamphlets, bookmarks and displays; Internet and Intranet sites)

- Place MIP articles about the online disability process
- Provide informational materials to regional organizations, adult living/retirement communities, and targeted government agencies
- Support field office relationships with library administrators that have establish centers dedicated to getting assistance with Online Services and inform the agency and local media about these centers that assist people in filing online
- Support field office relationships with disease specific organizations that benefit from online services and the QDD/CA listing (e.g. Alzheimer's nonprofits, Lou Gehrig's disease organizations, etc.)
- Continue to develop and strengthen partnerships with local and regional disability and advocacy organizations.
- Encourage organizations to link to the Social Security website
- When appropriate, distribute news releases, arrange media interviews and respond to news media inquiries

Tools:

- Relevant Social Security website pages
- MIP articles
- Publications (standard and alternate formats)
- Talking points and PowerPoint presentations for Public Affairs Specialists
- Audio-visual media
- Links from other organizations to the Social Security website
- *Social Security Update* articles

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Feedback from public, stakeholders and advocacy groups
- Track website visits, application usage, and other metrics

**Tactical Communications Plan 2B to support
Agency Strategic Plan Goal 2:
Improve the speed and quality of our disability process**

Communications Objective 2B: Support Health IT initiatives while continuing efforts to promote Electronic Records Express (ERE).

General Messages: 1. Health IT will improve the speed and consistency of Social Security's disability determinations. The faster we can make disability determinations, the faster we can start payments to individuals with disabilities.

2. Save time and money. Use Electronic Records Express to submit [*fill in* - medical/school/client] records to Social Security.

Audiences:

Health IT Initiatives –

Primary:

- Health care providers and networks

Secondary:

- Health and technology news media (i.e. newspapers, Internet, journals, magazines, etc.)
- Congressional offices and White House staff
- Internal audience (i.e. field offices, regional offices, hearing offices and State DDS employees)
- Disability advocacy groups
- Department of Health and Human Services, Office of the National Coordinator
- Health care vendors
- Medical professional organizations
- Health Information Exchanges (HIEs)
- Members of the public

Electronic Records Express –

- Health care providers and networks
- Potential disability applicants and their representatives
- School Administrators and teachers
- Disability advocacy groups
- Attorneys and Appointed Representatives

Offices: OC, OCOMM, Operations, OLCA and Systems

Tactics/Activities:

HIT –

Health IT Staff (Office of the Chief Information Officer) –

- | |
|---|
| <ul style="list-style-type: none"> ▪ Coordinate Social Security's overall outreach effort ▪ Represent Social Security in key outreach activities ▪ Communicate with other federal agencies and with state, local, tribal and private-sector entities |
|---|

Press Office –

- Handle press inquiries regarding Health IT
- Create press releases about Health IT as pertinent (i.e. contracts become effective)
- Secure placement of Health IT articles in publications and website

Office of External Affairs (OEA) –

- Coordinate and conduct outreach activities at the national level that will facilitate regional and local outreach activities with health care providers and networks
- Prepare a tactical plan for evaluating the Health IT outreach campaign
- Provide Health IT information tools, products and educational updates to health care providers and networks
- Coordinate training programs for health care providers and networks
- Track headquarters outreach activities
- Review feedback from headquarters and regions on effective outreach efforts and share best practices

Office of Communications Planning and Technology (OCPT) –

- Provide graphic art support for informational materials and Health IT displays
- Provide technical and visual graphic support for Health IT webinars and videos
- Maintain Health IT Internet and Intranet websites

Office of Operations

- Provide Health IT training to Social Security front-line employees

RCDs

- Prepare regional tactical plans for outreach to health care organizations and networks
- Coordinate regional outreach to health care organizations and networks
- Brief Congressional district staff on Health IT initiatives
- Track outreach events for health care organizations and networks within region
- Provide oversight, guidance and support to Public Affairs Specialists and Operations personnel who are conducting outreach to health care organizations and networks
- Provide ongoing feedback to Headquarters and other Regional Communication Directors on experiences with outreach messages, methods, products and audience responses
- Identify and coordinate regional venues for promoting ERE
- Inform about materials as needed (includes stuffer/flier; audience-oriented pamphlets, bookmarks and displays, Internet and Intranet sites)
- Provide public affairs contacts for the Professional Relations Officers (PROs) to promote the ERE process
- Continue to partner with PROs in identifying potential ERE outreach opportunities
- Assist with the development of the State ERE Project Plans by identifying proven marketing strategies that work locally
- Develop local press releases and news articles for the provider community on the ERE process
- Educate local state board officials and advocacy groups on the benefits of ERE
- Provide Field Office expertise and training to Claims Representatives
- Share regional and local booth space at professional events
- Distribute ERE publications with DDS contact information at public affairs events
- Educate people with disabilities and their parents about the electronic disability process and have them take the message back to their doctors
- Work with medical office directors and managers to promote ERE and enroll individual practices
- Work with regional educational organizations to disseminate information to their members to enroll in the ERE and submit student records electronically.

Office of Legislation and Congressional Affairs

- Brief key Congressional staff on Health IT initiatives
- Develop and maintain web pages, related to Health IT, in the "Information for Congress" section of www.socialsecurity.gov

Office of Systems

- Maintain and expand external relationships in the Health IT industry
- Articulate best practices and lessons learned through connecting with health care providers and networks in order to improve messaging to prospective providers
- Provide technical subject matter expertise for outreach events

ERE –

OCPT – Within budget constraints, provide communications support materials as requested by ODD for use by OEA, state DDSs and the Regions:

- Publications
- Displays/exhibits

OEA –

- Promote ERE services through partnerships with national health care provider organizations, state and local government entities (state Medicaid and public health clinics), national educational organizations, and disability oriented outlets, e.g., medical and hospital organizations, tribal governments, and Federal agencies such as VA
- Distribute marketing materials through national medical organizations
- Work with national organizations such as Healthcare Information and Management Systems Society (HIMSS) and American Health Information Management Association (AHIMA) to reach out to health information management executives to create buy-in regarding the cost benefits of submitting medical records electronically to Social Security for their patients
- Work with the Office of Systems and EMR software development companies to incorporate ERE in healthcare technology software development
- Work with national medical associations to create and sponsor CE training courses that highlight the Agency's improved disability process and ERE
- Work with medical office directors and managers to promote ERE and enroll individual practices
- Work with national educational organizations such as National Association of Elementary School Principals and National Association of Secondary School Principals to disseminate information to their members to enroll in the ERE and submit student records electronically (e.g., Teachers Questionnaire)
- Educate people with disabilities about the electronic disability process and have them take the message back to their doctors about ERE

Press Office – Respond to news media inquiries

Tools:

- MIP articles
- Publications (standard and alternate formats)
- *Social Security Update* articles
- Posters
- HIT website

- ERE website
- ERE Secure website demo and PowerPoint
- HIMSS Privacy & Security Toolkit (www.HIMSS.org)
- Model letter for Congressional offices
- Dear Colleague letter
- Video or other audiovisual products to assist the Office of the Chief Information Officer's Health IT Staff and Public Affairs Specialists
- Webinar
- Commissioner broadcast(s)
- OASIS article
- Social Media (YouTube, Facebook, Twitter, podcasts)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Feedback from public, stakeholders and advocacy groups
- Track web site visits, application usage, and other metrics, such as Medical Evidence of Record (MER) percentage

**Tactical Communications Plan 3A to support
Agency Strategic Plan Goal 3:
Improve our retiree and other core services**

Communications Objective 3A: Market Social Security's suite of online services

General Messages: Boldly Go to socialsecurity.gov. George Takei and Patty Duke campaigns.

1. *Go to socialsecurity.gov. It's So Easy!*
2. *If you are not comfortable with the Internet, ask a loved one to help you.*

Audiences:

- Individuals aged 55 and older potentially eligible for retirement
- Groups and organizations who work with individuals nearing retirement age:
 - Human Resource Managers' organizations
 - National organizations
 - Financial organizations
- SSA employees

Offices: OCOMM and Operations

Tactics/Activities:

OCPT – Develop and field the Patty Duke, George Takei campaigns:

- Television and radio PSAs
- Print Ads – magazine ads
- Web page postings & promo
 - Home page promotion
 - New Portal
 - TV PSA Page
 - Online demo of iClaim
 - Podcast page
- Displays and banner-ups
- Marketing kit
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Webinar
- Paid Internet Ads
- Paid Search Marketing/Sponsored ads
- Support RCD/Field requests for billboards, airport signage, and electronic billboards
- Support RCD efforts to promote the new homepage design and the Service Channeling Guide

OEA –

- Promote Social Security “Retire Online” through partnerships with human resource managers, financial planners, national organizations, educational institutions and appropriate government agencies
- Distribute marketing materials such as the Online Retirement Planning CD at pre-retirement seminars, workshops, employee benefit fairs and national conferences, educational institutions and government agencies
- Educate human resource personnel on Online Services so that they can help employees who are close to retirement

- Provide feature articles for newsletters of large companies, national organizations, and adult living/retirement communities promoting Social Security's website, www.socialsecurity.gov, and the Online Services initiative
- Promote the use of Online Services available on the Social Security website at pre-retirement seminars, workshops, employee benefit fairs and at the Social Security exhibit booth at significant national conferences such as the Society for Human Resource Management, National Council of La Raza and National Association for the Advancement of Colored People (NAACP)
- Strengthen partnerships with the American Library Association (ALA), and the Chief Officers of State Library Agencies (COSLA) to increase the number of libraries offering classes and distributing publications at their local libraries promoting Social Security's Online Services

Press Office –

- Promote Social Security's Online Services and the 2010-2011 Patty Duke initiative through increasing the amount and quality of press coverage:
 - Set up news media interviews, as appropriate
 - Campaign launch press conference
 - Satellite Media Tour
 - TV Media coverage
 - Print media coverage – newspaper articles
 - Issue news release(s) as appropriate
 - Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Promote participation in national Webinars
- Demonstrate SSA's Online Services at conventions and speeches
- Distribute materials to potential retirees through large companies' pre-retirement seminars, national organizations and adult living/retirement communities
- Work with organizations (that file on behalf of Social Security claimants) to encourage them to file online
- Create Social Security inserts with newspapers and feature MIP articles "authored" by local managers
 - Discuss using ad space from businesses that target the 55+ audience
- Distribute OCOMM MIP articles to local media
- Provide online services training to employers
- Promote Online Services at commercially sponsored conferences, seminars, and state fairs
- Inform the public of SSA's online application process in field office waiting areas and during interviews with claimants
- Create workgroups using frontline employees and supervisors to create and implement more effective strategies and talking points for Online Services promotion during interviews and at the Service Representative windows
- Incorporate information about Online Services into workshops for employers, financial planners and other local groups and organizations
- Conduct briefings for regional Federal, State, and local government legislators and staff about SSA's Online Services
- Participate in fairs, meetings, and events sponsored by regional Federal, State, and local government entities
- Promote the new homepage design and Service Channeling Guide

Tools:

- MIP articles
- eNews
- Presentation folders
- Online Services posters, banners, etc.– (George Takei & Patty Duke campaigns)
- *Social Security Statement* and inserts
- COLA notice and check stuffer
- Publications (standard and alternate formats)
- Universal PowerPoint
- SS Online talking points (Intranet)
- Retire Online media briefing points (Intranet)
- 800 number hold messages
- Online Services message PSAs (George Takei & Patty Duke)
- Social Security Retire Online exhibit displays and banner-ups
- Online Services message products (mouse pads, etc.)
- *Social Security Update* articles
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Service Channeling Guide

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track retirement application usage, website visits and other metrics associated with the Online Services promotional campaign
- Remain in regular contact with OQP and ORES regarding studies to stay ahead of trends and usage patterns.
- Track PSA plays
- Utilize search marketing analysis

**Tactical Communications Plan 3B to support
Agency Strategic Plan Goal 3:
Improve our retiree and other core services**

Communications Objective 3B: Market Social Security's website, Online Services, and Automated 800-number services to inform the public of available information and electronic services.

General Messages:

- 1.
 3. Save a trip! Visit www.socialsecurity.gov to find information and services you can use
 4. Save a trip! Call Social Security at 1-800-772-1213 and use our automated services – anytime, day or night!
3. *(Promotion of new homepage design and Service Channeling Guide -TBD)*

Audiences:

- General public/potential beneficiaries
- Human Resource managers/employees of corporations and other organizations
- Employers and small business owners
- National organizations and Federal agencies
- Social Security beneficiaries (for post-entitlement services)
- Financial planners
- National educational associations
- Other national organizations such as NAACP and National Council of La Raza
- Public libraries

Offices: OCOMM and Operations

Tactics/Activities:

OCPT – Review and develop or update message products and other communications tools as needed:

- PSA
- Publications
- MIP articles
- eNews
- *Social Security Update* articles
- Website
- Baby Names Satellite Media Tour
- Posters
- Products, as needed
- *Social Security Statement* and inserts
- COLA notice and check stuffer
- Universal PowerPoint
- Displays/exhibits
- Support RCD efforts to promote the new homepage design and the Service Channeling Guide

OEA –

- Increase awareness of and educate the public about Social Security's online and automated 800-number services through partnerships with human resource managers, national aging organizations, Federal agencies, and other outlets such as travel agencies, adult living or retirement communities, community colleges and libraries nationwide to increase the use and awareness of online services and the 800-number services
- Distribute marketing materials such as the Online Retirement Planning CD at pre-retirement seminars, workshops, employee benefit fairs and national conferences, educational institutions and Federal agencies such as Treasury and Labor
- Educate human resource personnel on online services and 800-number services so that they can help employees
- Provide feature articles for newsletters of large companies, national organizations, and adult living/retirement communities promoting Social Security's website, www.socialsecurity.gov and/or the 800-number services
- Promote the use of the online services available on the Social Security website at www.socialsecurity.gov at pre-retirement seminars, workshops, employee benefit fairs and at the Social Security exhibit booth at significant national conferences such as the National Education Association, National Council of La Raza and NAACP; promote the 800-number service as an alternative
- Encourage national organizations to link to www.socialsecurity.gov
- Strengthen partnerships with the American Library Association (ALA) and the Chief Officers of State Library Agencies (COSLA) to increase the number of libraries offering classes and distributing publications at their local libraries promoting Social Security's Online Services
- Strengthen relationships with Chambers of Commerce and other Small Business Owner organizations to promote Business Services Online

Press Office –

- Continue to promote Social Security's website and 800-number services through increasing the amount and quality of press coverage:
 - Set up news media interviews as appropriate
 - Issue news release(s) as appropriate
 - Respond to news media inquiries
- Coordinate with Regional Public Affairs staff to produce a PSA Press Event for the George Takei and Patty Duke Online Services PSA.
- Direct a Baby names Satellite Media Tour using Regional Staff to support outreach to local media outlets.

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Demonstrate SSA's online applications at conventions and speeches; promote 80-number services as an alternative
- Work with organizations (that file on behalf of Social Security claimants) to encourage them to file online
- Distribute MIP articles to local media
- Provide online services training to employers
- Promote online filing at conferences, seminars, and state fairs
- Promote the Multi-Language Gateway to local ethnic community organizations
- Utilize OEA as a resource to strengthen and enhance local and regional partnerships with library administrators
- Contact library administrators (city, county, and state) and establish centers to assist people in filing online, or encourage libraries to devote space for a "Senior Section" if space allows.

- Develop relationships with disease specific organization listings that would benefit from online services (e.g. Alzheimer’s nonprofits, Lou Gehrig’s disease organizations, etc.)
- Inform the public of SSA’s online application process and 800-number services during interviews with claimants
- Provide assistance to the Region’s Employer Services Liaison Officer(s) in their efforts to market online wage reporting to the small business community.
- Distribute online wage reporting and Basic Pilot CDs at seminars, and conventions
- Incorporate information into online services workshops for employers
- Conduct briefings for Federal, State, and local government legislators and staff about SSA’s online services
- Participate in fairs, meetings, and events sponsored by Federal, State, and local government entities
- Provide training to Federal, State, and local government agency staff on SSA’s online services and 800-number offerings
- Provide support for PSA Press Event and utilize contacts with local, regional, and national media if an event is taking place within a specific Region’s jurisdiction
- Provide support to the Press Office to facilitate the Baby Names Satellite Media Tour
- Promote the new homepage design and Service Channeling Guide

Tools:

- MIP articles
- *eNews*
- Presentation folders
- “Save a Trip” posters, banners, etc.
- *Social Security Statement* and inserts
- COLA notice and check stuffer
- Universal PowerPoint
- SS Online talking points (Intranet)
- BEST PowerPoint (Intranet)
- Online services media briefing points (Intranet)
- 800 number hold messages
- PSAs
- Press Events
- Satellite Media Tours
- Publications (standard and alternate formats)
- *Social Security Update* articles
- Social Security Online exhibit displays, table-tops and banner stands (“Save a Trip” graphics include the 800 number)
- Social Media (YouTube, Facebook, Twitter, podcasts)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track website visits
- Track online service usage
- Track 800-number automated services usage
- Track PSA plays
- Utilize search marketing analysis

**Tactical Communications Plan 3C to support
Agency Strategic Plan Goal 3:
Improve our retiree and other core services**

Communications Objective 3C: Support Medicare Extra Help Outreach by informing the public of the program and the changes as a result of Medicare Improvements for Patients and Providers Act (MIPPA) and the Affordable Care Act.

General Messages: 1. It's easier than ever to save on prescription costs – Apply Now!

3. (Mother's Day & Father's Day messaging & promotion – TBD)

Audiences:

- Primary:
 - Medicare beneficiaries potentially eligible for Extra Help
- Secondary:
 - National organizations in aging, disability, medical, pharmacy, nursing, assisted living, and social work in health care
 - Major pharmacy and retail chains
 - Faith & community based organizations
 - Federal, state & local agencies
 - Care givers and elderly parent advocates
 - Friends and relatives of those on Medicare
 - Medical and hospital organizations
 - Congressional office staff
 - News media

Offices: OCOMM, Operations and OLCA

Tactics/Activities:

Office of Communications (OCOMM) – Provide information to the public about changes to the Extra Help program

Office of Public Inquiries (OPI) –

- Develop language for inquiries about the legislative changes
- Establish subject identifier for inquiries about the legislative changes
- Identify and process any inquiries about the legislative changes Report any trends in inquiries about the legislative changes

Office of External Affairs (OEA) –

- Prepare a headquarters outreach tactical plan and coordinate outreach activities at the national level that will facilitate regional and local outreach activities with states and other third parties
- Prepare a tactical plan for evaluating the Extra Help outreach campaign
- Provide public information tools educational updates to national organizations and their affiliates
- Coordinate training programs for advocate groups on the legislative changes and promote online filing
- Track headquarters outreach activities using tracking tool that is provided

- Review feedback from headquarters and regions on effective outreach efforts and share best practices
- Convene roundtable discussions/advocate meetings with key national organizations

Office of Communications Planning and Technology (OCPT) –

- Update scannable subsidy application (Form SSA-1020) in English and Spanish and create an instructional version of the application in English, Spanish and 14 additional languages
- Update redetermination and subsidy changing event forms (1026-REDE & 1026-SCE) in English and Spanish
- Develop public information materials about the changes to Extra Help and the MSP
- Develop training materials for state Medicaid agencies, community-based organizations and other third parties
- Post model MSP application in 10 languages to www.socialsecurity.gov
- **Create products to support Mother's Day and Father's Day activities**

Office of Operations –

- Provide training to Social Security front-line employees about the legislative changes and the revised Extra Help application
- Take applications onsite in targeted areas
- Receive and process applications

Regional Communications Directors (RCDs) –

- Prepare regional tactical plans for outreach
- Coordinate regional outreach activities
- Brief Congressional district staff on the legislative changes and the revised Extra Help application
- Track outreach events within region using the tracking tool provided.
- Provide oversight, guidance and support to Public Affairs Specialists and Operations personnel who are conducting training and outreach events
- Provide ongoing feedback to Headquarters and other RCDs on experiences with outreach messages, methods, products and audience responses
- Provide training to the states on the changes to the Extra Help application and promote online filing
- Provide training to community-based organizations on the changes to the Extra Help application and promote online filing
- Work with CMS, states and local partners on Part D initiatives to coordinate efforts and avoid duplication
- Conduct outreach events regionally
- Coordinate outreach activities in accordance with the Mother's Day and Father's Day campaign message

Office of Legislation and Congressional Affairs –

- Brief key Congressional staff on changes to the Medicare Part D Extra Help application and outreach activities
- Develop and maintain web pages, related to the legislative changes and outreach activities, in the "Information for Congress" section of www.socialsecurity.gov

Tools:

- Online subsidy application (i1020)
- Scannable paper application (Form SSA-1020) in English and Spanish

- Instructional version of the Extra Help application in English, Spanish and 14 additional languages
- Redetermination and subsidy changing event forms (1026-REDE & 1026-SCE) in English and Spanish
- New Extra Help publication in English and Spanish to explain the legislative changes
- 16 Extra Help publications in English or Spanish
- Redetermination publication in English and Spanish
- Four Extra Help publications in 14 languages other than English and Spanish
- Medicare Extra Help websites on the Internet—Prescription Help, Organizations and Español
- Medicare Extra Help website on the Intranet
- Frequently Asked Questions on the legislative changes
- Talking points
- Posters in English, Spanish, Chinese and Vietnamese Public information displays—tabletop display, banner stand and other graphic display products in English, Spanish and 14 additional languages
- Model letter for Congressional offices
- Dear Colleague letters to advocates
- Video or other audiovisual products regarding the new legislative changes to assist Public Affairs Specialists, advocates and other third parties (e.g., PowerPoint presentation in English, Spanish, Chinese and Vietnamese)
- Training materials for states, non-profits and other third parties
- Columns and radio scripts for Media Information Page
- 800-number hold messages
- Notice to denied applicants about legislative changes
- *Social Security Update* articles

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track numbers of applications

**Tactical Communications Plan 3D to support
Agency Strategic Plan Goal 3:
Improve our retiree and other core services**

Communications Objective 3D: Market Social Security's new Spanish-language Retirement Estimator (S-RE).

General Message:

(Spanish-language Retirement Estimator message TBD)

Audiences:

- Individuals aged 55 and older potentially eligible for retirement
- Young workers
- Groups and organizations who work with individuals nearing retirement age:
 - Human Resource Managers' organizations
 - National organizations
 - Financial organizations
- Local and National organizations that focus on the concerns of the Spanish speaking population
- SSA employees

Offices: OCOMM and Operations

Tactics/Activities:

OCPT –

- Television and radio PSAs
- Print Ads – magazine ads
- Web page postings & promo
 - Home page promotion
 - New Portal
 - TV PSA Page
 - **Online demo of RE/S-RE**
 - Podcast page
- Displays and banner-ups
- Marketing kit
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Webinar
- Paid Internet Ads
- Paid Search Marketing/Sponsored ads
- Support RCD/Field requests for billboards, airport signage, and electronic billboards

OEA –

- Promote Social Security “Retire Online” through partnerships with human resource managers, financial planners, national organizations, educational institutions and appropriate government agencies
- Distribute marketing materials such as the Online Retirement Planning CD at pre-retirement seminars, workshops, employee benefit fairs and national conferences, educational institutions and government agencies
- Educate human resource personnel on Online Services so that they can help employees who are close to retirement

- Provide feature articles for newsletters of large companies, national organizations, and adult living/retirement communities promoting Social Security's website, www.socialsecurity.gov, and the Online Services initiative
- Promote the use of Online Services available on the Social Security website at pre-retirement seminars, workshops, employee benefit fairs and at the Social Security exhibit booth at significant national conferences such as the Society for Human Resource Management, National Council of La Raza and National Association for the Advancement of Colored People (NAACP)
- Strengthen partnerships with the American Library Association (ALA), and the Chief Officers of State Library Agencies (COSLA) to increase the number of libraries offering classes and distributing publications at their local libraries promoting Social Security's Online Services

Press Office –

- Promote Social Security's new S-RE by increasing the amount and quality of press coverage:
 - Set up news media interviews, as appropriate
 - Satellite Media Tour
 - TV Media coverage
 - Print media coverage – newspaper articles
 - Issue news release(s) as appropriate
 - Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Promote participation in national Webinars
- Demonstrate SSA's Online Services at conventions and speeches
- Distribute materials to potential retirees through large companies' pre-retirement seminars, national organizations and adult living/retirement communities
- Work with organizations (that file on behalf of Social Security claimants) to encourage them to file online
- Distribute OCOMM MIP articles to local media
- Continue to promote the RE with special emphasis on the S-RE as a new service to appropriate audiences
- Provide S-RE training to employers
- Promote S-RE at commercially sponsored conferences, seminars, and state fairs
- Inform the public of SSA's S-RE process in field office waiting areas
- Utilize workgroups already created by frontline employees and supervisors to brainstorm and implement more effective strategies and talking points for S-RE promotion at the Service Representative windows
- Incorporate information about S-RE into workshops for employers, financial planners and other local groups and organizations
- Conduct briefings for regional Federal, State, and local government legislators and staff about SSA's S-RE
- Participate in fairs, meetings, and events sponsored by regional Federal, State, and local government entities

Tools:

- MIP articles
- eNews
- Presentation folders

- Online Services posters, banners, etc.– (George Takei & Patty Duke campaigns)
- *Social Security Statement* and inserts
- COLA notice and check stuffer
- Publications (standard and alternate formats)
- Universal PowerPoint
- Social Security S-RE talking points (Intranet)
- S-RE media briefing points (Intranet)
- 800 number hold messages
- Online Services message PSAs (George Takei & Patty Duke)
- Exhibit displays and banner-ups
- Online Services message products (mouse pads, etc.)
- *Social Security Update* articles
- Social Media (YouTube, Facebook, Twitter, podcasts)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track usage of RE/S-RE
- Remain in regular contact with OQP and ORES regarding studies to stay ahead of trends and usage patterns.

**Tactical Communications Plan 3E to support
Agency Strategic Plan Goal 3:
Improve our retiree and other core services**

Communications Objective 3E: Market Social Security's Direct Deposit/Direct Express payment option.

General Message:

Go Direct!

Audiences:

- All beneficiaries
- SSA employees

Offices: OCOMM and Operations

Tactics/Activities:

OCPT –

- Television and radio PSAs
- Print Ads – magazine ads
- Web page postings & promo
 - Home page promotion
 - New Portal
 - TV PSA Page
 - Online demo of Direct Express enrollment
 - Podcast page
- Displays and banner-ups
- Marketing kit
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Webinar
- Paid Internet Ads
- Paid Search Marketing/Sponsored ads
- Support RCD/Field requests for billboards, airport signage, and electronic billboards

OEA –

- Promote Social Security “Direct Deposit/Direct Express” through partnerships with human resource managers, financial planners, national organizations, educational institutions and appropriate government agencies
- Distribute marketing materials related to Direct Deposit/Direct Express
- Provide feature articles for newsletters of national organizations, and adult living/retirement communities promoting Social Security’s website, www.socialsecurity.gov, and the Direct Deposit/Direct Express initiative
- Promote the use of Direct Deposit/Direct Express available on the Social Security website at pre-retirement seminars, workshops, employee benefit fairs and at the Social Security exhibit booth at significant national conferences such as the Society for Human Resource Management, National Council of La Raza and National Association for the Advancement of Colored People (NAACP)
- Strengthen partnerships with the American Library Association (ALA), and the Chief Officers of State Library Agencies (COSLA) to increase the number of libraries offering classes and distributing publications at their local libraries promoting Social

Security's Online Services

Press Office –

- Promote Social Security's Direct Deposit/Direct Express services and the 2010-2011 Patty Duke/George Takei initiative through increasing the amount and quality of press coverage:
 - Set up news media interviews, as appropriate
 - Campaign launch press conference
 - Satellite Media Tour
 - TV Media coverage
 - Print media coverage – newspaper articles
 - Issue news release(s) as appropriate
 - Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Promote participation in national Webinars
- Demonstrate SSA's Direct Deposit/Direct Express Services at conventions and speeches
- Distribute materials to potential enrollees through large companies' pre-retirement seminars, national organizations and adult living/retirement communities
- Work with organizations (that file on behalf of Social Security claimants) to encourage their clients to enroll in Direct Deposit/Direct Express
- Create Social Security inserts with newspapers and feature MIP articles "authored" by local managers
 - Discuss using ad space from businesses that target the 55+ audience
- Distribute OCOMM MIP articles to local media
- Promote Direct Deposit/Direct Express at commercially sponsored conferences, seminars, and state fairs
- Inform the public of SSA's Direct Deposit/Direct Express services in field office waiting areas and during interviews with claimants
- Utilize existing workgroups made up of frontline employees and supervisors to create and implement more effective strategies and talking points for Direct Deposit/Direct Express
- Increase promotion during interviews and at the Service Representative windows
- Incorporate information about Direct Deposit/Direct Express into workshops for employers, financial planners and other local groups and organizations
- Conduct briefings for regional Federal, State, and local government legislators and staff about SSA's Direct Deposit/Direct Express Services
- Participate in fairs, meetings, and events sponsored by regional Federal, State, and local government entities

Tools:

- MIP articles
- eNews
- Presentation folders
- Direct Deposit posters, banners, etc.– (George Takei & Patty Duke campaigns)
- *Social Security Statement* and inserts
- COLA notice and check stuffer
- Publications (standard and alternate formats)
- Universal PowerPoint

- SS Direct Deposit/Direct Express talking points (Intranet)
- Direct Deposit/Direct Express media briefing points (Intranet)
- 800 number hold messages
- Direct Deposit message PSAs (George Takei & Patty Duke)
- Social Security Direct Deposit/Direct Express exhibit displays and banner-ups
- Direct Deposit/Direct Express message products (mouse pads, etc.)
- *Social Security Update* articles
- Social Media (YouTube, Facebook, Twitter, podcasts)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track PSA plays

**Tactical Communications Plan 4A to support
Agency Strategic Plan Goal 4:
Preserve the public's trust in our programs**

Communications Objective 4A: Inform the public of the need to protect their Social Security Number and card.

General Message:

Protect your Social Security Number and card. Keep your card in a safe place and do not give out your Social Security Number unnecessarily.

Audiences:

- Primary:
 - General public
 - Parents of newborns
 - Aliens
 - Employers/Human Resource Managers
 - SSA employees
- Secondary:
 - Educational institutions, such as public school systems, universities and colleges
 - Other government agencies, federal, state and local
 - Banking/Insurance Industries
 - Pension Plan Administrators
 - Third Party Payroll Providers
 - CPA/Tax Professionals specializing in wage reporting
 - Federal Bank Regulatory Agencies
 - Mortgage Banking Association
 - Medical Facilities

Offices: OCOMM and Operations

Tactics/Activities:

OCPT – Review, update and develop materials and other communications tools as needed:

- Web pages
- Publications
- MIP articles
- *Social Security Update* articles
- FAQs
- Displays/exhibits

OEA –

- Promote protection of the SSN and card in partnerships with human resource managers, national organizations and Federal agencies, like IRS, FTC and DHS
- Distribute materials through large companies pre-retirement seminars, national organizations and other Federal agencies
- Promote this message at seminars and booths at major benefit fairs and conferences
- Provide feature articles for newsletters of large companies, national organizations and Federal agencies
- Promote message in upcoming webinars/webcasts

- Promote message through Facebook and Twitter postings
- Speaking engagements at appropriate conferences, including but not limited to:
 - American Payroll Association Conferences
 - IRS Tax Forums
 - National Association of Tax Professionals Conference
 - Independent Payroll Providers Association Conference
- Provide drop-in articles for organizational newsletters and publications, including but not limited to:
 - Paytech
 - BNA
 - Keep Up -To-Date On Payroll
- A separate e-mail campaign to inform and educate – on an as-needed basis – interested parties (those most affected by) about the overt redesign features and enhanced security measures of the Social Security card. Some organizations might include:
 - SHRM – Society for Human Resource Management
 - APA – American Payroll Association
 - IFEBP – International Federation of Employee Benefit Plans
 - State MVAs – Motor Vehicle Administrations
 - State BVSS – Bureaus of Vital Statistics

Press Office –

- Issue news release(s) when appropriate
- Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Distribute current articles and news columns available on the MIP
- Work with third parties to disseminate enumeration requirement information
- Inform the public in field offices about SSA's initiatives to strengthen the integrity of SSNs and their role in protecting their SSN
- Issue reminders to employees about the importance of safeguarding Personally Identifiable Information (PII)

Tools:

- Publications in print and on the Internet (standard and alternate formats) in English, Spanish and selected other languages:
 - Your Social Security Number And Card
 - Social Security Numbers For Children
 - Identity Theft And Your Social Security Number
 - New Numbers For Domestic Violence Victims
 - Numbers for Noncitizens
 - Foreign Workers And Social Security Numbers
 - International Students And Social Security Numbers
- Selected publications from the list above in English, Spanish and Asian languages distributed through the Public Information Distribution Center in Pueblo, Colorado through our IAA with GSA.
- Media briefing points on the Intranet:
 - Protecting the SSN
 - SSN Integrity
- *Social Security Statement*

- MIP articles
- *Social Security Update* articles
- FAQs
- Internet page at www.socialsecurity.gov/ssnumber
- VOCUS
- Talking Points
- Fact Sheet
- *W2 News*
- SSA/IRS Reporter
- Dear/E-colleague letters
- Banner-up displays
- *Social Security Update* articles
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Publications (standard and alternate formats)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget.
- Feedback from public, stakeholders and advocacy groups

**Tactical Communications Plan 4B to support
Agency Strategic Plan Goal 4:
Preserve the public's trust in our programs**

Communications Objective 4B: Inform the public about our Online Security Measures.

General Message:

We protect the information we collect and maintain about you

Audiences:

- Primary:
 - General public
 - SSA employees

Offices: OCOMM and Operations

Tactics/Activities:

OCPT – Review, update and develop materials and other communications tools as needed:

- Web pages
- Publications
- MIP articles
- *Social Security Update* articles
- FAQs
- Displays/exhibits

OEA –

- Distribute materials through large companies pre-retirement seminars, national organizations and other Federal agencies
- Promote this message at seminars and booths at major benefit fairs and conferences
- Provide feature articles for newsletters of large companies, national organizations and Federal agencies
- Promote message in upcoming webinars/webcasts
- Promote message through Facebook and Twitter postings

Press Office –

- Issue news release(s) when appropriate
- Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Distribute current articles and news columns available on the MIP
- Issue reminders to employees about the importance of safeguarding Personally Identifiable Information (PII)

Tools:

- Media briefing points on the Intranet:

- Protecting the SSN
- SSN Integrity
- *Social Security Statement*
- MIP articles
- *Social Security Update* articles
- FAQs
- Talking Points
- Fact Sheet
- Dear/E-colleague letters
- Banner-up displays
- *Social Security Update* articles
- Social Media (YouTube, Facebook, Twitter, podcasts)
- Publications (standard and alternate formats)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget.
- Feedback from public, stakeholders and advocacy groups

Tactical Communications Plan to support Agency Strategic Plan Special Initiative: Encourage Saving

Communications Objective: Inform the public of the role of savings in their lives and the need for sound financial planning. Utilize Financial Literacy Research (FLRC) projects to supplement Regional outreach efforts.

General Message: Planning for your financial future is important. Social Security has information and tools you can use

Audiences:

- General public
- Potential retirees/spouses/families
- Human Resource managers/employees of corporations and other organizations
- National organizations and targeted Federal agencies
- Financial planners
- Targeted Federal agencies such as Treasury, Department of Labor
- Schools

Office: OCOMM and Operations

Tactics/Activities:

OCPT – Review and develop or update materials and other communications tools as needed:

- Relevant Social Security website pages
- Links to other government websites devotes to savings and financial literacy
- *Social Security Statement* and stuffer(s)
 - Explore additional audience segmentation
 - Explore feasibility of adding new features
- Universal PowerPoint
- Financial solvency issues media briefing points (Intranet)
- MIP articles
- *Social Security Update* articles
- FAQs
- Online Retirement Planning CD

OEA –

- Distribute marketing materials such as the Online Retirement Planning CD, the Extra Savings Slide Calculator, and pamphlets such as *Understanding the Benefits* at national conferences, financial literacy fairs, pre-retirement seminars, employee benefit fairs, educational institutions and partnerships with other Federal agencies
- Partner with organizations to promote financial literacy and promote use of the *Retirement Estimator* as a financial and retirement planning tool to provide immediate and personalized benefit estimates that is tied to a person's actual Social Security earnings record
- Highlight the online Retirement Planners and Benefit Calculators, the Windfall and Elimination Provision and the Government Pension Offset factsheets, the Retirement Estimator and the WEP and GPO online calculators at www.socialsecurity.gov when demonstrating the Online Retirement Planning CD for Human Resource Managers in both the public and private sectors, Financial Planners, other Federal agencies like Treasury and Labor also working on Financial Literacy initiatives, as well as

attendees at national conferences, employee benefit fairs, and pre-retirement seminars

- Conduct workshops and participate in panel discussions at national conferences and explain Social Security replaces only about 40% of pre-retirement income for the average worker so it is important to have pensions, savings and investments for a comfortable retirement
- Continue participation in the U.S. Financial Literacy and Education Commission (FLEC) that was created in January 2004 to promote financial literacy and education nationwide; FLEC runs the www.mymoney.gov website which includes at least 20 Social Security links and promotes the free “My Money” Toolkit which includes *Understanding the Benefits* pamphlet
- Encourage national organizations to link to Social Security website, www.socialsecurity.gov and/or other relevant Social Security web pages such as Retirement Planner’s “Near Retirement” page, Retirement Estimator, Financial Planners and Human Resource Managers websites
- Participate in Financial Literacy Day on Capitol Hill in collaboration with Jump\$tart Coalition, JA Worldwide and National Council on Economic Education
- Develop contacts at the Financial Literacy Research Consortium (FLRC) multidisciplinary research centers at Boston College, the [RAND Corporation](#), and the University of Wisconsin and pursue mutually beneficial conferences, roundtables, or media events to inform the public about the importance of a secure retirement.
- Expand participation in financial literacy conferences such as the Annual Financial Literacy Leadership, National Association of Personal Financial Advisors, and Financial Planning Association’s annual conferences
- Participate in Financial Literacy and Education Fair at SSA headquarters
- Work to get articles about important issues like the need to supplement Social Security with other sources of retirement income published in the newspaper and magazine articles such as AARP, MORE, etc.
- Promote financial literacy and use of the *Retirement Estimator* as a financial and retirement planning tool to provide immediate and personalized benefit estimates that is tied to a person’s actual Social Security earnings record through Facebook and Twitter

Press Office –

- Set up news media interviews as appropriate
- Issue news release(s) as appropriate
- Respond to news media inquiries

OPI – Review and update online Correspondence Guide Language to respond to inquiries

Office of Operations (RCDs) –

- Use/publicize new or updated materials and other communications tools:
 - Relevant Social Security website pages
 - *Social Security Statement* and stuffer(s)
 - Universal PowerPoint
 - Financial solvency issues media briefing points (Intranet)
 - MIP articles
 - *Social Security Update* articles
 - FAQs
 - Online Retirement Planning CD
- Distribute marketing materials such as the Online Retirement Planning CD, the Extra Savings Slide Calculator, and pamphlets such as *Understanding the Benefits* at local and regional conferences, financial literacy fairs, pre-retirement seminars, employee benefit fairs and educational institutions

- Develop contacts at local FLRC multidisciplinary research centers or projects in your region and pursue activities that inform the public and/or create media opportunities that highlight the proactive stance Social Security has taken to promote awareness about retirement.
- Partner with organizations to promote financial literacy and promote use of the Social Security Statement as a financial and retirement planning tool
- Highlight the online Retirement Planners and Benefit Calculators at www.socialsecurity.gov when demonstrating the Online Retirement Planning CD for Human Resource Managers in both the public and private sectors, financial planners, as well as attendees at regional conferences, employee benefit fairs, and pre-retirement seminars
- Conduct workshops and participate in panel discussions at regional conferences and explain that Social Security replaces only about 40% of pre-retirement income for the average worker so it is important to have pensions, savings and investments for a comfortable retirement
- Encourage regional organizations to link to the Social Security website, www.socialsecurity.gov, and/or other relevant Social Security web pages such as Retirement Planner's "Near Retirement" page and "Online Benefit Calculators"
- Expand participation in financial literacy conferences
- Work to get MIP articles about important issues such as the need to supplement Social Security with other sources of retirement income published in local newspapers and magazines
- When appropriate, distribute news releases; arrange media interviews; and respond to news media inquiries

Tools:

- Relevant Social Security website pages
- *Social Security Statement*
- Universal PowerPoint
- SSA publications for the "My Money Toolkit" at www.mymoney.gov made available through our IAA with GSA
- www.mymoney.gov
- www.ssa.gov/retirementpolicy/financial-literacy.html
- PARC website
- Financial solvency issues media briefing points (Intranet)
- MIP articles
- *Social Security Update* articles
- FAQs
- Online Retirement Planning CD
- Social Security Board of Trustee's annual report
- Life Expectancy Calculator
- Financial Literacy PowerPoint
- Extra Savings Slide Calculators
- Publications (standard and alternate formats)
- Social Media (YouTube, Facebook, Twitter, podcasts)

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget
- Track usage of online tools

Tactical Communications Plan to support Agency Strategic Plan Key Foundational Element: Employees

Communications Objective: Support Agency efforts to provide an environment and culture that fosters employee retention, promotes achievement in public service, and encourages the pursuit of personal excellence –

- A) Keep employees informed of the Commissioner’s priorities and messages;
- B) Support internal communications activities.

General Message: Our employees are the foundation of the agency and our most valuable asset for providing the service the public expects and deserves.

Audience: Social Security employees

Offices: OCOMM and Operations

Tactics/Activities:

OCPT –

- Issue COSS messages timely and accurately to employees using the communication vehicles available for this purpose (see “Tools”)
- Review, update, improve and add communications tools as needed (e.g., internal-use videos, posters, etc.)
- Provide internal communications services to other components on request (e.g., provide visual graphics products and photography that support agency events such as Hispanic Heritage Month, Diversity Conference, awards ceremonies, etc.)
- Produce other materials for internal and external use as needed
- Support National Public Affairs Training Conference 2011
- Engage in activities to promote clarity and transparency of job functions from all components in OCOMM, and strive to foster a positive, collaborative work environment.

OEA – Prepare and conduct National Public Affairs Training Conference 2011

Press Office – Assist in providing news updates to employees

Office of Operations (RCDs) –

- Using the communication vehicles available for this purpose (see tools) assist in providing news updates on COSS messages to employees
- Review, update, improve and add regional communications tools as needed
- Provide assistance and/or visual graphics products to support regional activities such as diversity events, awards ceremonies, campaigns for employees (Think Twice First; FO Spotlights), and RC special occasion messages (PSRW, holiday, end-of-year), etc.
- Assist as needed in developing a communications strategy
- Assist as needed in developing appropriate program/event agendas
- Provide guidance as needed in communicating with targeted audience
- Assist in providing news updates to employees
- Engage in activities to promote clarity and transparency of job functions from all components, and strive to foster a positive, collaborative work environment.

Tools:

- COSS broadcasts
- Internal Communications broadcasts
- OASIS
- Special-use publications
- NPATC 2011

Evaluation/Measurement –

- Agreed-to activities are executed on time and on budget
- Feedback from employees and stakeholders

Tactical Communications Plan to support Agency Strategic Plan Key Foundational Element: Information Technology

Communications Objective: Support agency objectives to modernize our information technology infrastructure.

General Message: Technology is the foundation of our ability to provide services to the public.

Audiences:

- Members of Congress, key committees and staffs
- Affected state government agencies
- General public/potential and current beneficiaries
- Organizations with an interest in the disability process
- Organizations with an interest in retirement and financial planning
- SSA employees

Offices: OLCA lead; supported by OCOMM and Operations

Tactics/Activities:

OCPT – Review, update, improve and add communications tools as needed

OEA –

- Develop and maintain relationships with IT, disability and retirement/financial planning communities to gain support for SSA IT initiatives, but also to seek out examples of best practices, in conjunction with the OCIO and Systems
- Assist Systems, OCIO and ODO in working with external IT partners/users (e.g., state DDSs, DMVs, health IT, etc.) on modernizing SSA's IT infrastructure

Press Office – Provide news updates as warranted

Office of Operations (RCDs) –

- Assist in providing news updates using the communication vehicles available for this purpose (see tools)
- Review, update, improve and add regional communications tools as needed

Tools:

- Agency Strategic Plan
- IT Vision document
- Fact sheets and other briefing materials
- News media updates as warranted
- To be determined

Evaluation/Measurement –

- Agreed-to tactical plans/activities are executed on time and on budget.
- Feedback from Congress, public, employees, stakeholders and advocacy groups