



## Best Practices in Social Marketing

Advocacy Strategies for State Outreach and Increased Credibility

### Presenter Disclosures

The following personal financial relationships with commercial interests relevant to this presentation existed during the past 12 months:

**No relationships to disclose for OSBHCA or individual presenters**

## Presentation Objectives

- Define social marketing and describe its important principles that can be used to advocate for school based health care
- Use case studies to show positive social marketing in action, especially in advocacy
- Discussion and share experiences, challenges, successes among audience members

## Social Marketing

- Group opener:
  - Have you used social marketing? How?
    - For fundraising?
    - For advocacy?
  - How many are struggling with the 'tent' question or education/health care reform in your work?

## Marketing Defined

*"Marketing is a dialogue over time with specific groups of customers whose needs you understand in depth and for whom you develop an offer with a different advantage over the offer of your competitors."*

[www.buildingbrands.com](http://www.buildingbrands.com)

## Social Marketing Defined

- A process for influencing human behavior on a large scale, using marketing principles for the purpose of societal benefit rather than commercial profit
- At the heart of the social marketing approach is the understanding of your audiences' needs and wants and the commitment to create programs, plans, and practices to help them solve their problems

## Ongoing Marketing is Called...

### Branding!

*"Simply put, a brand is a promise. By identifying and authenticating a product or service it delivers a pledge of satisfaction and quality."*

*Walter Landor*

## Branding Logos are Abstract for a Reason...



Growing collaboration between  
schools and communities  
to provide better access to  
health care for Ohio's children

## Four 'P's of Traditional Marketing

1. Product
2. Price
3. Place
4. Promotion



### The Marketing Mix

- Price (value)
- Product (solution)
- Place (access)
- Promotion (info)

## Product

- What are you asking the target audience to do?
- What are the benefits to the target audience?
- What is your "competition"? What could your target audience do instead?

## Price

- What are the costs (financial and otherwise) for your target audience to participate?
- What are other barriers that preclude your target audience from participating?
- How can you minimize costs and remove barriers?

## Place

- Where are the places that the target audience makes decisions about participation?
- Where does your target audience spend time?
- What information distribution systems does your target audience use and prefer?

## Promotion

- Which communication channels does your target audience pay attention to the most and trust?
- How can you best package your opportunities to reach your target audience effectively and efficiently?
- Who can act as a credible and engaging spokesperson for the benefits of your offerings?

## Exchange

### You Give Me

- ▣ \$1

### You Get

- ▣ A Pepsi
  - ▣ A thirst quencher
  - ▣ Good taste
  - ▣ Fun
  - ▣ Youthful feeling
  - ▣ Girl/boyfriend

Source: [www.turningpointprogram.com](http://www.turningpointprogram.com)

## Four Additional 'P's of Social Marketing

1. Publics
2. Partnership
3. Policy
4. Purse Strings

## Publics

- Who are the people outside your constituency that you need to engage to increase your success?
- Whose support do you need inside your organization to increase your success?

## Partnership

- Are there other organizations...
- doing similar work with which you could collaborate?
  - that could bring needed resources and skills?
  - that would be politically advantageous to align with ?

## Policy

- Are there any policies that could be highlighted to heighten interest in SBHCs?
- Are there ways to showcase influential policymakers who endorse the policy?

## Purse Strings

- Is the funding you currently have sufficient to achieve all of your objectives?
- Is there the potential of corporate sponsorship of your SBHC?

## Stages of Social Marketing

1. Planning
2. Messaging & Materials Development
3. Pre-Testing
4. Implementation
5. Evaluation & Feedback

## Stage #1: Planning

- Objective: What change or new innovation do you hope that recipients implement as a result of your efforts?
- Target audience: Who are you primarily trying to reach with your efforts?
- Gatekeepers: Who has the most influence over your target audience?

## Stage #2: Message & Materials Development

- What messages will resonate with your target audience?
- What types of materials will you develop to convey your messages to your target audience?
- How will you reach various personality types in your audience?

## Stage #3: Pre-Testing

- Test your messages and materials with a sub-section of your target audience and secondary audience.
- Refine your messages and materials, as necessary.

## Stage #4: Implementation

- What channels will you use to distribute your messages and materials?
- How will you prepare and use your “primary influencers” to help you implement your marketing efforts?
- How will you continue to ensure your target audience receives your message?

## Stage #5: Evaluation & Feedback

- How will you gather feedback to evaluate your marketing strategy along the way?
- How will you measure if you were ultimately successful?

## Ohio as a Case Study



Ohio - The Buckeye State

## Ohio Social Marketing

- TOT Cycle 1: Partnered with Michigan
- Presentation to OSBHCA Board at Annual Meeting 2007
- OSBHCA wanted to utilize social marketing principles to increase advocacy and grow its credibility and outreach
- Not sure how at that point....

## Ohio Context-OSBHCA's Tent

- 17 SBHCs serving 40 schools
- 26 SBHCs in 2004-2005 NASBHC Census
- More MH-school programs than primary based or linked, mobile dental or P-MH
- Dental programs:
  - Ohio Dept of Health reports there are 20 sealant programs in 43 counties serving about 30,000 children annually in 600 schools.
  - CincySmiles Foundation serves about 6000 of those kids in 7 counties in 340 schools

## Ohio Publics

- Since 2006, a new school health movement has re-emerged
  - Health in general-Medicaid expansion & Ohio benefit bank
  - Mental health parity; diabetes coverage; PA/Nutrition legislation
  - Afterschool funding; Voices for Ohio's Children focusing on EPSDT, early care
  - Childhood obesity work-including Ohio Business Roundtable support
  - ODE: Comprehensive systems of learning supports

## Ohio Publics

- State associations, including OSBHCA, re-engaging the Governor and state legislature in advocating for school health services
- 2008: CDC CSH grant re-awarded to Ohio in joint work between ODH-ODE
- 2009: Governor Strickland makes clear education reform will be included in state budget; executive language talks to 'whole child' in education and wrap-around services; family-community engagement coordinators, extended learning, increased health services

## Ohio Context-Publics

- Opportunity: how to coordinate and break down silos of school health/learning supports groups
- Opportunity: how to build an overarching "addressing non-academic barriers to academic success" beyond the SBHC-only model/tent-we simply can't do it alone!
- Coordination among the field-how do we bring all involved in school health/learning supports services together to advocate? Can we?

## Purse Strings: HFGC Grant 2008-2010

- In light of our growth from 2006-2008 and our context in Ohio, HFGC proposed a grant idea to increase advocacy, collaboration and field coordination for OSBHCA
- Wrote grant June 2009; awarded for Jan 2009-Dec 2010
- Hired advocacy director June 2009



## Purse Strings: HFGC Grant 2008-2010

- Key component of the grant includes:
  - **State advocacy director and increased organizational capacity**-The state advocacy director will network and strengthen ties with other statewide organizations and agencies, do the legwork in convening the statewide conversation with stakeholder about a coordinated approach to learning supports, coordinate with the field coordinators in mobilizing grassroots support in communities with SBHCs, and work with the executive director in increasing the visibility of the organization and the field.

## Partnerships

- Who would be at the table?



## Policy: Statehouse Day

- What would both highlight SBHCS/the state association, bring value to other partners and fulfill the mission of our grant?
  - ▣ An identified need for some kind of advocacy day trying to bring all school health/learning supports groups (and those they serve) together in a meaningful way
  - ▣ The state budget was sure to include education reform as well as kids health expansion, so timing was there; also working with the Ohio Mental Health Network for School Success on Policy Development and Advocacy trainings to encourage attendance and educate on the 'how tos' in state advocacy

## Stage 1: Planning

- September 2008-first meeting; asked representatives from all groups to come and plan for a day focused on advocacy for Ohio School Health/learning supports
- Could we agree to a set of policies that all could agree to advocate for?
- How do we incorporate social marketing principles-youth, families, colors, branding (with so many diverse groups, one brand was difficult!)
- Place: Date agreed to: April 14, 2009, Statehouse Atrium
- MOU for each group to sign
- No organization dollars contributed; planned to break even on registration costs/CE

## Stage 1: Planning

- Objective: create a day that convenes school health/learning supports groups to advocate for state legislative support of these services given the current climate
- Target Audience: Legislators we the target for the advocacy; those involved in supporting learning were targeted for registration (including youth/families)
- Gatekeepers-partners/other state associations (to plan, market, encourage attendance, otherwise participate & volunteer)

## Stage 1: Planning

- Product:
  - ▣ Agenda development-incorporating CE, state departments, key legislators, Ohio models
  - ▣ Youth engagement
  - ▣ Pre-scheduled legislative visits
- Price: \$30-much discussion
- Promotion:
  - ▣ Engaging the media
  - ▣ Banners, artwork and picture collection

## Stage 2: Messaging and Materials

- Challenges: "school health" language not all-inclusive
- How to capture a diverse group of attendees but have a cohesive message of some kind
- Build in a 'movement' concept
- Getting gatekeepers to agree; entice others to sign on

# Stage 1: Planning-Final Agenda

## Healthy, Supported Students for Academic Success

Statehouse Atrium, Columbus  
 9:00 a.m. to 3:30 p.m. Programming  
 3:30 p.m. to 4:00 p.m.-Youth Rally

### Agenda

- 8:30 a.m. **Registration and Continental Breakfast Opens**
- 9:00 a.m. **Welcome and Opening Remarks**  
 Marilyn Crumpton, President, Ohio School Based Health Care Association
- 9:15 a.m. **Healthy, Supported Students for Academic Success-A Continuum**  
 Jennifer Blatz, Director of Operations, STRIVE
- 10:00 a.m. **Remarks from First Lady Frances Stickland**
- 10:15 a.m. **State Department Panel: The Importance of Healthy, Supported Children for Better Academic Outcomes**  
 Dr. Mary Lou Rush, Executive Director, Center for Students, Families and Communities, Ohio Department of Education  
 Sandy Stephenson, Director, Ohio Department of Mental Health  
 Dr. Alvin Jackson, Director, Ohio Department of Health
- 10:30 a.m. **Ohio Collaborative Models in School Health and Learning Support**  
Ohio Care Team Model Panelists:  
 Michele Timmons, Care Team Collaborative, Muskingum County  
 Krista Allison, Ohio's Stark County CARE Team Initiative (ICARE)  
 Dr. Richard Murray, Superintendent, Muskingum Valley Educational Service Center  
  
Cincinnati Community Learning Center Model Panelists:  
 Darlene Kamine, Community Learning Centers  
 Annie Bogenschutz, Ethel Taylor Community Learning Center  
 Caryn Williams, Ethel Taylor Community Learning Center
- 11:30 a.m. **Healthy, Supported Students for Academic Success Partner Advocacy Panel**  
 Moderated by Kate Keller, Senior Program Officer, Health Foundation of Greater Cincinnati

# Stage 1: Planning-Final Agenda

- 12:30 p.m. **Lunch with Legislators and Commendation to Participants**  
 Representative Ron Gerberry (D, Austintown)
- 1:30 p.m. **Individual Statehouse Options**  
 A) Pre-scheduled Legislative Meetings  
 B) Monitor Committee/Session  
 C) Statehouse Tour  
 D) Mobile Health Unit Tour
- 2:30 p.m. **Individual Statehouse Options Repeat**
- 3:30 p.m. **Youth Rally and Media Event**  
 West Side of Statehouse, High Street Side



# Statehouse Day Marketing

**You know children need to be healthy  
and supported to learn...**



# Statehouse Day



**Now is the time to tell them.**

With ONE VOICE, we are calling all those who work to address the non-academic barriers facing Ohio students to join in a special advocacy and continuing education event at the Ohio Statehouse Atrium in downtown Columbus.

In-school providers of care; community wrap around services in primary, mental and oral health care; out-of-school-time students; parents; foundations: this is our opportunity to collaborate, learn and share different strategies to support students and with ONE VOICE tell Ohio legislators about the necessity for these services to Ohio's students.

With ONE VOICE we are asking you to join us in promoting HEALTHY, SUPPORTED STUDENTS FOR ACADEMIC SUCCESS.



## Exchange

### You Give Us

- ▣ \$30 and the hours of 9 a.m. to 4 p.m. on April 14th

### You Get

- ▣ An advocacy/CE day
  - ▣ 3.5 hours for RNs/SW
  - ▣ Prescheduled legislative meetings
  - ▣ Networking
  - ▣ A sense of feeling like a part of a greater movement
  - ▣ Venue to communicate, learn, ask questions


## Stage 3: Pre-testing

- ▣ Disclaimer: This was not data-driven
- ▣ Response was very positive among planners/gatekeepers
- ▣ Other groups responsive to day and wanted to include their logo, present, etc.

## Stage 4: Implementation

- Online tools/Constant Contact outreach- each planner/gatekeeper utilized developed marketing to pass along and/or submitted contact lists to OSBHCA for us to encourage registration
- Online registration/PayPal account
- Legislative invites in paper, via phone and email
- Printed 700 mailers for registration

## Stage 4: Implementation



**Ohio School Based Health Care Association**

Legislative & E-News Update for Friday, June 12, 2009

**Health Care Reform Stakeholder Meetings**

Health Committee Chair Barbara Boyd and Vice Chair John Patrick Carney invite you to present at the first of a series of stakeholder meetings to discuss health care reform in Ohio. Each meeting will feature brief presentations from representatives of the payer, provider and patient-advocate communities. Following the presentations, members of the Health Committee will have an opportunity to ask questions. The goal of the meetings is to begin a dialogue which will enable the Health Committee to form a cohesive vision for health care reform in Ohio and craft legislation in accordance with that vision.

Each payer, provider or patient advocate will speak for 3-5 minutes on one or more issues, concerns or ideas related to health care.

DATE: Thursday, June 18, 2009  
TIME: 1:00 PM  
PLACE: Ohio Statehouse, Room 311

This is a great opportunity for OSBHCA members to showcase the work they are doing to increase access to quality health care in Ohio's schools. PLEASE contact Heidi Welch at [heidi@ohschoolbasedhealthcare.org](mailto:heidi@ohschoolbasedhealthcare.org) if you are interested in presenting, and she will make take care of arrangements with the Chairwoman's office, as well as assisting you in preparing your testimony.

**URGENT News from NASBHC**

[The Healthy Schools Act of 2009-Your calls needed TODAY!](#)

As you know, Senators Stabenow (D-MI), Bennett (D-CO), Durbin (D-OH), Kerry (D-MA), Levin (D-MI), Snowe (D-ME), and Wyden (D-OR), introduced the bill this past May. Since then, after 2000 actions taken using NASBHC's action center, and over fifty signed calls (and there could be many more that did not report calling), three senators have agreed to sign-on as cosponsors: Sen. Fain (D-IN), Sen. Blumenthal (D-CT), and Sen. Udall (D-CO). Thank you to everyone who encouraged and mobilized their peers, in conjunction with our action alert, to call their Senators. We are still trying to get sign-ons to keep up the calls and be sure to ask to speak to the health legislative assistant in your Senator's office.

We expect the House bill to be introduced either this week, and are excited that it will be cosponsored by Representative Towns (D-NY), Sarbanes (D-MD), and Oseguera (D-NM). Before the bill is introduced, we need to secure a few more additional original cosponsors so PLEASE START YOUR CALLS IMMEDIATELY.

**OSBHCA Members: Your action is needed!**

Please call Congressman Tim Ryan and request that he sign on as a Co-Sponsor of this legislation.

We have placed a phone call and sent an email on behalf of OSBHCA, now it is time for our members in the field to make their voices heard!

Call: (800) 856-4152 and ask for Congressman Ryan's Health Legislative Aide. Urge the Congressman to sign on as a co-sponsor as he did with the Healthy Schools Act of 2007.

**State Budget News**

[Conference Committee Looks to Cut \\$7.6 Billion, Taking Budget to FY09-00 Levels](#)

[Family Advocates: Raise Taxes to Protect Services](#)

[Dispatch: Cuts, not taxes, may fix shortfall](#)

[Governor: Government service allocates brace for more cuts from budget plan but keep pressure on policy makers](#)

[Senators: Budget deficit expectations grow, leaders have 'productive meeting'](#)

[Governor: Removal of Strickland health insurance provisions key sticking point for Budget](#)

# Statehouse Day Implementation

Healthy Supported Students  
for Academic Success

Statehouse Atrium  
Columbus, Ohio

# Statehouse Day Implementation



OSBHCA: Growing collaboration between schools and communities to provide better access to health care for Ohio's Children

- School based health centers are **partnerships between schools and community health organizations** to provide health care services in schools.
- School based health centers are a good example of the **coordinated school health and learning supports model in practice**. While each center in Ohio is different, an ideal school based health center provides **primary, oral and behavioral health services via partnerships with community services**, has an advisory council with parent and youth representatives, is a dynamic part of the health education and promotion staff team in the school, works to promote Medicaid enrollment, feeding programs, resource coordination and afterschool opportunities for students, and serves as a resource for health and wellness for the staff and community.
- A majority of school based health centers serve **urban and rural populations**, providing access to otherwise underserved areas.

## Statehouse Day Implementation



School nurses are Registered Nurses (RNs) holding baccalaureate degrees who have completed additional graduate coursework in education and advanced nursing.

Ohio ranks 45<sup>th</sup> in the nation for the ratio of school nurses to students. The recommended ratio is 1:750 for well students to 1:125 in student populations with complex health care needs. In Ohio that ratio is 1:2326.

- School Nurses provide comprehensive **physical and mental health services** dealing with asthma, diabetes, seizures, life-threatening allergies, attention deficit disorder, depression, anxiety, and behavioral problems such as bullying, substance abuse, eating disorders, and sexuality issues. They also care for acutely ill students and staff and perform routine **screenings and referrals**.
- Advancements in medical care and an increase in the special needs population in schools result in multiple, complex health care issues and needed interventions taking place at school
- School Nurses **link families with community resources**, health care, social and support services.

## Statehouse Day Implementation



In existence since 2001, the Ohio Mental Health Network for School Success (OMHNSS) consists of action networks spearheaded by affiliate organizations in six regions of Ohio.

### TODAY IN OHIO

- Over 8% of Ohio youth aged 12 to 17 have experienced at least one episode of Major Depression in the past year. (SAMHSA, Office of Applied Studies, National Survey on Drug Use and Health, 2004 and 2005)
- One in five high school students in Ohio report seriously considering a suicide attempt in the past 12 months.
- Suicide is the 3rd leading cause of death among young people and is considered a public health crisis by both the Center for Disease Control and Prevention and the World Health Organization.
- Across the state of Ohio, the average school counselor to student ratio for all grade levels is 1 to 479. (U.S. Department of Education, National Center for Education Statistics, October 2007)
- Emotional disability is the fastest growing special education designation in Ohio.

# Statehouse Day



## YOUTH RALLY!!

*Healthy, Supported Students for Academic Success*  
West Statehouse Lawn (High Street Side)  
April 14, 2009  
3:30 p.m. to 4:00 p.m.



Hear from Ohio youth and families how they are supported in school and by their communities as we celebrate *Healthy, Supported Students for Academic Success!*



### Featuring:

- Introduction by: Kathy Oberlin, Ohio Mental Health Network for School Success
- Welcome: Austin Bright, Tri-Valley High School
- The Short Stop Drum and Dance Ensemble: Bria Hoke, Zaharah Jordan, Kaya Gordon, Tiera Maxwell, Alaina Jordan, and Antwane Ross (Franklin County Directions for Youth)
- Rachel Lewis and Peter Mattson, Mental Health Youth Advocates
- Earl and Ryan Pyle, father and son advocates for support services
- TEEN RAP: Tennyson Adams, II and Cortez Stokes
- Closing: Alayna Peadon, West Muskingum High School, Zanesville



# Statehouse Day Implementation



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## Statehouse Day Implementation



## Stage 5: Evaluation and Feedback

### By the Numbers:

- 26 'collaborating groups'
- Total attendees (not counting legislators): 134
- Total legislators and staff that attended lunch: 51
- Total registered no-shows: 27
- Total attendees requesting CE: 50
- Total scheduled legislative meetings (Options A & B): 74
- 90% rated the day's CE presentations good-excellent
- Only 2 evals came back saying that, if asked, would not attend again

### Media Coverage:

Statehouse Day received a write up in two statewide daily newspapers.  
Video/story ran on Channel 10 news in Columbus

Lots and lots of youth!



## Stage 5: Evaluation and Feedback

- Unquantifiable benefits-connecting folks via conversation
  - ▣ CARE Team and University partners; School RNs and Afterschool programs
  - ▣ Many of the issues presented were included in the state budget-this cannot relate completely to statehouse day
  - ▣ Impression on legislators very favorable-but what action they do with it we may never be able to quantify in total

## Stage 5: Evaluation and Feedback

- Positive comments in evals and de-briefing meetings:
  - ▣ Youth incorporation fantastic-being three, artwork, speaking, etc.
  - ▣ Number of legislators and staff at lunch great
  - ▣ First time so many advocates on 'school health' had come together, met, talked, depth and breadth of issues/groups was wonderful
  - ▣ First Lady and State Departments were wonderful
  - ▣ Interesting to see different models
  - ▣ So many legislative visits!
  - ▣ Day was well-organized, looked wonderful

## Stage 5: Evaluation and Feedback

- Suggestions for improvement moving forward:
  - Agenda too long
  - No clear focus of policy asks
  - Youth needed to kick off or be during lunch-more focus on youth 'asks'
  - **Lost OSBHCA in there**
  - Set up in regions worked for lunch, but not for ANY other time throughout the day
  - Didn't break even-is there shared ownership in cost going forward?
  - What is the follow up?

## OSBHCA Moving Forward

- <http://www.affinisc ape.org/osbhca/>
- Action center
- Events calendar

## OSBHCA Moving Forward

- Group Discussion:
  - ▣ Other models?
  - ▣ Other venues such as Facebook?
  - ▣ Other success stories/challenges faced?
  - ▣ Questions/comments/suggestions for improvements?

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