

# **Social Marketing in Public Health**

## **PUBH 731**

### **Spring, 2020**

#### **I. Description**

Modern commercial marketing has been fabulously successful over the past 60 years in creating conditions that support purchasing behaviors of individuals, families and communities around the world, regardless of class, income or location. For commercial marketers, there are no “hard to reach” audiences. They are very adept at understanding the wants, needs and aspirations of people and they offer products, both tangible and intangible, that people believe meet their needs. These people (aka “customers” or “audiences”) are willing to exchange something (usually money, possibly time and convenience) for these products—and to make that exchange happily.

*Social* marketing harnesses this knowledge and power to create conditions that support social and behavioral changes that increase the well-being and quality of life for individuals, families and societies around the world. Social marketing is not the same as social *media*, nor does it depend solely on communication (e.g., PSAs, advertisements) to create change. Rather, it is a systematic way to understand the determinants of health and social problems and to address these causes with an array of interventions—in a way that makes change “fun, easy and popular”! This course examines the application of marketing principles to ameliorate public health, safety and environmental problems.

#### **The course has three major assumptions:**

1. Historical public health approaches such as communication, education and law may have limited effectiveness in addressing the current threats to the public’s health such as: the epidemic of chronic diseases; the increasing prevalence of vaccine-preventable diseases and food borne illnesses; and the emergence of environmental threats to health, like climate change and increases in the geographical range of diseases and their vectors.
2. A combination of individual actions, political will and societal factors influence today’s major public health issues.
3. Public health, if it is to be effective in the 21st century, must become more adept at influencing *both* individual behavior *and* the social and political systems and institutions that help shape that behavior. Marketing has the power to do this!

## **Course structure**

The first part of the course is foundational, covering marketing basics, a look at public health in a market environment, an exploration of the limits of communication alone to effect change and an overview of several theories and planning approaches that the world social marketing community currently finds helpful. The second part provides an in-depth experience creating a social marketing plan to address a public health, safety or environmental issue.

## **II. Objectives**

Upon successful completion of Social Marketing in Public Health, students will be able to:

1. Describe the rationale for integrating market-based strategies into traditional public health program planning, implementation and evaluation
2. Understand the limits of communications-only approaches to behavior change
3. Begin using marketing concepts and processes to develop interventions that create the social change for healthier communities
4. Find resources to continue their formation as users of social marketing

## **III. Required Text**

Lee, N. and Kotler, P. (2020). *Social Marketing: Behavior Change for Social Good*. (6<sup>th</sup> edition). Other resources are in Sakai or are hyperlinked from the syllabus.

## **IV. Course Requirements and Submission of Assignments**

Each of you is responsible for the following:

### **Weekly**

- Studying the formal presentations
- Reading assigned chapters in the texts
- Reading assigned supplementary articles and resources
- Completing and submitting individual study assignments

### **As Scheduled** (*refer to VIII. Schedule of Topics & Assignments*)

- Participating in team discussions by posting original comments and responding to postings (see section V)
- Completing and submitting team assignments

### **Submitting Assignments**

Submit all written assignments via Sakai, by the due date and time.

## Formatting Assignments

Complete written assignments in Microsoft Word, use standard formatting (one inch margins, 12 pt. font, double-spaced). Include your name (or group name for team assignments), class number, institution and date (all centered) on a cover page. **Save the document file name as follows\*:**

Student (or team) name, Class ##, Assignment Title.doc

*For example:* Rikki Tavi, Class #1, Social Marketing Resources.doc

*Or:* Magic Marketeers, Class #12, Promotion.doc

\*Please attend to this. It may seem a small thing, but it makes grading so much easier. And a happy instructor is a good thing when he is grading, right?!

**Important Note:** Please check all assignments (electronically or otherwise) for spelling and grammar prior to submission. Errors in spelling and grammar will detract from grades. (See Section VII. **Grammar and Spelling** document in the Course Materials.)

## **V. Process for Team Assignments**

You will work in teams for the assignments for Classes #3 and #5 and for Part Two of the course. I work to compose teams that are balanced in terms of experience and background, based on the information you shared with me.

### **To-dos and Tips from Past Classes**

1. **By Class #3, a)** decide on a team name and e-mail your decision to me; **b)** assign a facilitator for each class session that has a team assignment. Some members may need to facilitate the work for more than one class, depending on the size of your team.

2. Develop an action plan to respond to each assignment. Past classes have found it helpful to develop a calendar for each week that goes something like this: M-W, read lesson materials, discuss the assignment and arrive at a consensus response; Th-F, facilitator drafts the response and circulates it for comment; F-Sa, facilitator makes changes; Sa-Su, facilitator writes final draft and submits on Sunday night. *(This is for illustration purposes only, based on the desire of previous classes to have suggestions on how to approach group assignments. Develop a plan that works for your team!)*

3. Read the assignment, develop a team response, write that up and submit it via Sakai. The team assignments in Part Two use the social marketing planning sheets from the back of your textbook. For convenience, I have placed Word versions of these in the folders for the related class.

## Options for Discussion and Document Sharing

You may use the default options provided by Sakai. Some teams in the past have wanted a more dynamic way to discuss assignments and share documents. I am open to your using other platforms (e.g., Google Docs, Skype, etc.) with these caveats:

- All team members must be able to utilize the technology
- I have access to your discussion trail so I can observe group process and add helpful content comments

*If your team wants to use an alternative, let's discuss first!*

## Team Name

Decide on a name for your team. *Send it to me with your first team assignment in Class #3.* Be creative! Decide on a name that inspires you or that expresses your "brand."

## Team Contract

I will give each group a contract for members to discuss and sign so you can establish the norms for how you want to work and interact.

## VI. Grading

This is a three-credit course. As such, the university expects that students will spend approximately 9 hours a week reading and viewing the lessons and doing the assigned readings and work. Grades will be based according to the criteria below.

### Work Assignment

#### Percentage of Final Grade

Class #1 Individual Assignment	5%
Class #3 Team Assignment	10%
Class #5 Individual Assignment	20%
Class #14 Individual Assignment	P/F
Individual Participation in Team	25%
Final Team Project	<u>40%</u>
	= 100%

**Grading Scale:**

H	Clear Excellence
P	Entirely Satisfactory
L	Low Passing
F	Failed
IN	Incomplete

Explanation: You may earn a grade of **H** only by exceeding all expectations in the assignment (e.g., clear, concise, well written assignments; creative, well-reasoned or conceptualized arguments; use of course concepts; incorporation of additional, relevant resources; grammatically correct; etc.). A **P** is "Perfectly Acceptable." **L** is a performance on assignments that is below the acceptable level for graduate students (e.g., not understanding the course materials very well, not having a grasp of what is required in assignments, continually handing in assignments that have grammatical and spelling errors, not contributing to the task and relationship work in your team, etc.). **F** is failing.

I sometimes add pluses and minus to the grades on assignments to provide you with more nuanced feedback. However, the university only allows the letter grades above.

**Note about Grades for Team Assignments and Participation**

There are two graded team assignments: the Class #3 field trip and the final project. All members of a team receive the same grade, based on the quality of the work. I determine your participation grade based on my observations of your discussions and on three confidential peer evaluations each person completes about their team members, using four measures:

- This team member actively participated in team assignments
- This team member accomplished tasks on time
- This team member's work reflected an acceptable level of thought and effort.
- This team member functioned as a valuable member of the team by supporting the efforts of the other team members.

**Your Life and Grades**

I realize each of you has a life outside of this course. If you have something going on that is affecting your work for the class, let me know! Communicate early and often! [cmnewton@ad.unc.edu](mailto:cmnewton@ad.unc.edu).

## **VII. Grammar and Spelling!**

Please reread your individual and team assignments and use spell and grammar check before submitting them. (*Note: I say this as someone who writes a good bit and who has his own issues with grammar and spelling!*) I do count off for grammar and spelling errors.

*If you see red, blue or green lines under a word or a phrase in your work, correct it!!*

### **APA Style Guide**

I prefer that you use the APA Style Guide, 6<sup>th</sup> Edition. You may purchase a hard copy at the usual sources. You may also wish to use these on-line resources:

1. The Owl at Purdue University: <https://owl.english.purdue.edu/owl/resource/560/01>. **(Past classes report that this is especially helpful and that they have used it at work or for other classes.)**
2. "Learning APA Style": <https://www.apastyle.org/>
3. Degelman, D. (2017). *APA Style Essentials*:  
<http://www.vanguard.edu/psychology/faculty/douglas-degelman/apa-style/>

Additionally, I have placed a copy of the "APA Style Guide to Electronic References" in Sakai. It is helpful to use with all the good information you obtain online!

## **VIII. Schedule of Topics & Assignments**

### ***☞ Part One: Marketing Public Health Basics***

#### **Class 1 - The Public Health Marketing Environment** 1/8-12

- Introduction to the history and basic concepts of social marketing
- Marketing enables public health to do carry out its core services

##### a. Textbook Reading

Chapter 1, Defining and Distinguishing Social Marketing, pp. 3-27. Copy in Course Materials in Sakai for those who have not received their book.

##### b. Lecture

"Marketing: An Essential Public Health Function"

PowerPoint with voiceover: "Social Marketing, Love and the Beauty of the Sea"

c. Assigned Readings and Resources

Deshpande, S. (2019). Social marketing's strengths, weaknesses, opportunities, and threats (SWOT): A commentary. *Social Marketing Quarterly*. 25 4, pp. 231–241.

Kotler, P. and Zaltman, G. (July, 1971). Social marketing: An approach to planned social change. *Journal of Marketing*, 85, pp. 8-12. (*This is the article that first conceptualized social marketing and launched the field.*)

d. Assignment: Social Marketing Resources (Length 2.5 pages)

Purpose: 1) to begin exploring the rich canon of resources the social marketing community has generated over the 47 years of its history, 2) to become familiar with writing using APA style.

**Look over** the resources listed in Appendix D "Social Marketing Resources," beginning on page D-1 of your text. Pick five (5) that look interesting to you and explore them.

**Write** a paper that succinctly describes each resource. Include: 1) the name of the resource, 2) a citation for it, 3) what you found interesting about it, 4) how you might use it either to address an issue or to develop your social marketing skills. Use APA guidelines to cite your resources.

Class 1 assignment is due by 11:59 PM on Tuesday January 14<sup>th</sup>

(*Note: most assignments are due on Sunday. I want you to have extra time since the first week of class is a short week.*)

**Class 2 - Public Health in a Market Culture and in the Social Environment**

1/13-19

- Social and cultural factors that influence public health
- Criticisms of the public health social justice and social change agenda
- Current challenges and opportunities for public health marketing

a. Textbook Reading

None

b. Lecture

"Public Health in a Market Culture and in the Social Environment"

c. Assigned Readings and Resources

Resnick and Siegel, Chapter 3, Challenges for Marketing Social Change (From: Resnick, E. A. and Siegel, M. [2013]. *Marketing Public Health: Strategies to Promote Social Change*. [3<sup>rd</sup> edition]).

Resnick and Siegel, Chapter 4, Challenges for Marketing Public Health

Beauchamp, D. "Public Health as Social Justice." *Inquiry*, Vol. XIII (March 1976), pp. 3-14. (*A classic look the ethics of behavior and social change efforts in public health.*)

Castrucci, B. C., (2018, December 5). [An issue Americans agree on: Investing in Public Health](#). *Governing*.

Himmelstein, D. U., Woolhandler, S., Cooney, R., McKee, M., & Horton, R. (September 22, 2018). The Lancet commission on public policy and health in the Trump era. *The Lancet*. 392, 993-995. doi: 10.1016/S0140-6736(18)32171-8.

Optional, but recommended

"[This is Public Health](#)." (0:1:49). This is a short video of on-the-street interviews in which people try to explain what public health is. The video is from an orientation to local public health in Massachusetts.

North Carolina Division of Public Health, State Center for Health Statistics. (January 2002). [Perceptions of public health, quality of life, and the threat of bioterrorism among North Carolina adults](#). (Statistical Brief 23). *Note: this is the only marketing survey the state public health system has conducted about the public health system in North Carolina.*

d. Assignment

None

**Class 3 - Social Marketing Basics** 1/20-26

- The social marketing process
- Social marketing compared to other behavior change approaches, such as education and law
- Use in *upstream policy interventions*
- Ethical issues in social marketing



a. Textbook Reading

Chapter 2, 10 Step Strategic Planning Model, pp. 29-53, top of page  
Chapter 17, pp. 478-480, "Box 17.4, Ethical Norms and Values for Marketers"\*  
\*(Note: each chapter addresses germane ethical issues.)

b. Lecture

"Social Marketing Basics"

PowerPoint with voiceover: "Social Marketing Basics not to Miss":  
[http://media.sph.unc.edu/adobe/pubh731/marketing\\_basics/](http://media.sph.unc.edu/adobe/pubh731/marketing_basics/). (If this does not  
open in a new window, copy and paste the URL in your browser.)

c. Assigned Readings and Resources

Kennedy, A-M., Kemper, J. A., & Parsons, A. G. (2018). Upstream social  
marketing strategy. *Journal of Social Marketing*. 8 3, pp. 258-279. Doi:  
10.1108/JSOCM-03-2017-0016

Rothschild, M. (October 1999). Carrots, sticks and promises: A conceptual  
framework for the management of public health and issue behavior. *Journal of  
Marketing*. 63 pp. 24-37. (While 20+ years old, Rothschild's trichotomy of  
education, marketing and law informs social marketing thought and practice to  
this day. You can ask about his Motivations-Opportunity-Ability framework in  
formative research and use responses to make decisions the most effective  
interventions to put in place.)

Webcast: University of South Florida, *Dialogues in Social Marketing: The Future  
of Social Marketing*, with Professors Alan Andreasen and Phil Kotler,  
[https://hsccapture1.health.usf.edu/Panopto/Pages/Viewer.aspx?id=0e97d9c1-  
ffd6-451f-be2a-86342bbe8736](https://hsccapture1.health.usf.edu/Panopto/Pages/Viewer.aspx?id=0e97d9c1-ffd6-451f-be2a-86342bbe8736) (~1:04:00)

\*\*Get yourself a bag of popcorn or a cup of coffee, settle back and meet the  
**father** and **godfather** of social marketing: Phil Kotler and Alan Andreasen!!  
This April 2015 interview with them (by Carol Bryant, whom I consider the  
**godmother** of social marketing in public health!) is a fascinating listen to the  
past, the current state and the future of social marketing.

d. Team Assignment: Field Trip (Length 2 pages)

Purpose: 1) to experience how a commercial enterprise uses the four basic  
marketing strategies (Product, Price, Place, and Promotion, aka "the 4 Ps"), 2) to  
begin developing your group.

Follow the process outlined in the "Process for Team Assignments" (p. 3, above).

Complete the readings and lecture then, **as individuals**, pay a visit to your local  
supermarket. Leave your wallet, checkbook, and credit cards locked in the car.

Walk around the store, observing how the grocery industry and the supermarket chain use the 4 P's to sell groceries. You may want to jot notes about your observations.

**As a team**, discuss your observations and findings. Aggregate your thoughts and write a team analysis of how the Four Ps are used to market grocery products and services. **At the end of the analysis**, include your team's thoughts on the following question: "Is the marketing of groceries really different from marketing a public health service, program or policy?" If so, how? If not, why not?

***Remember to send me your team name!***

Class 3 assignment is due by 11:59 PM on Sunday January 26<sup>th</sup>

👉 *For team assignments, please have one person from your group submit it as an **e-mail attachment** to me, rather than going through the Assignments menu item.)*

**Class 4 - Strategic Marketing Communication Highlights:  
Branding, Positioning and Framing**

1/27-2/2

- Routine operational communication vs. strategic marketing communication
- Branding, positioning and framing as tools for setting and conveying the value of public health
- The role of communication in a social marketing plan

a. Textbook Reading  
None

b. Lecture  
"Strategic Marketing Communication Highlights: Branding, Positioning and Framing"

c. Assigned Readings and Resources

Kirby, S. D., Taylor, M. K., Freimuth, V. S., and Parvanta, C. F. (2001). Identity Building and Branding at CDC: A Case Study. *Social Marketing Quarterly*. 72, pp. 16–35

Siegel, M., & Lotenberg, L. D. Chapter 8, Marketing Public Health as an Institution—A Case Study (From: Siegel, M., & Lotenberg, L. D. [2006]. *Marketing Public Health: Strategies to Promote Social Change*. [2<sup>nd</sup> edition])

Frameworks Institute. "[A Five Minute Refresher Course in Framing.](#)"

Optional, but recommended

Frameworks Institute. (n.d.). [Research on issues: Health](#). This web page presents research and recommendations on using meaning communication frames for 15 public health problems, from addiction, to environmental health, to housing.

d. Assignment

None

**Class 5 - Communication: Issues and Limits**

2/3-9

- Public health is overly dependent on communication to achieve its goals
- Communication-only approaches have limited impact on behavior
- Determinants of health behavior

a. Textbook Reading

None

b. Lecture

"Communication: Issues and Limits"

c. Assigned Readings and Resources

Snyder, L.B. (2007, March-April). Health communication campaigns and their impact on behavior. *Journal of Nutrition Education*. Supplement 2, S32-S40

Blog post: "Questions to Prevent Awareness Fever." Social Butterfly\*, <http://www.fly4change.com/questions-to-prevent-awareness-building-fever/1656/>

*\*Social Butterfly is a blog published by Alexandra (aka Alex) Bornkessel, a rising star in both social marketing and social media. Alex is Program Director of Social Innovation and Digital Strategy in the Center for Communication Science at RTI International, in Research Triangle Park, NC.*

Christiano, A., and Neimand, A. (2017). Stop raising awareness already. *Stanford Social Innovation Review*. Spring, 2017, 34-41. **\*\*Read pages 34-38, up to "Creating Awareness that Leads to Action"**

YouTube video: "Using community based social marketing to enable behaviour change," by Doug McKenzie-Mohr<sup>†</sup>, <http://www.youtube.com/watch?v=6I-wbjtOKaE>. View the video presentation up to 0:26:18. **Note especially** his comments about the widespread use of "information-intensive" campaigns, why

they are inadequate to produce behavior change and why he thinks informational campaigns are so prevalent.

*†Doug has a background in conservation psychology. He is the dean of community-based social marketing, which combines social and environmental psychology precepts with social marketing.*

d. This week has **both** an individual and a team assignment.

1. Individual Assignment: Differences Between Communication vs. Social Marketing (Length 2 pages)

Purpose: to appreciate the differences between a communication-only approach and a social marketing approach to addressing a public health issue.

a. **Read** the Case Study 2. "Changing Traditions: Preventing Illness Associated with Chitterlings," posted in Sakai

b. **View** the PowerPoint presentation with my comments, "Chitlins Case Study," in the Class 5 folder.

c. **Write** a paper that describes the differences you notice between the communications-only approach and the social marketing approach. What do you think it was about the social marketing approach that made it more effective in this case?

Class 5 individual assignment is due by 11:59 PM on Sunday February 9<sup>th</sup>

2. Team Assignment: Proposal for Social Marketing Project—*ungraded* (Length half to three-quarters page.)

Purpose: for me to give you feedback about whether your issue is amenable to a social marketing approach.

In Part 2 of the course, you will develop as a team a social marketing project to remediate an actual public health, environmental or safety issue that affects the quality of life for a population. The purpose of the project is to give you an opportunity to do the social marketing process and to think like a marketer. You will choose the issue. This will not be a plan that you implement (though some past teams have been able to implement their plan in a member's work setting).

I am open about the issue you select, with these parameters:

- It is an actual problem that affects the quality of life for a population, or a problem that impacts on the ability of public health to carry out its mission (e.g., funding, workforce capacity, building partnerships, etc.).
- It requires a change in behaviors (as opposed to solely a change in knowledge or awareness). ...*continues...*

- It needs more than communication strategies to address it.

**To do:** Talk as a group, decide on your issue and **write a brief description that includes:**

1. Background on the problem (what it is, why it is a concern, etc.)
2. Who the affected audiences are (they may be downstream or upstream)

There is an example proposal from last year's course in the Class #5 folder for you to look at. You do not have to use statistics or references, but if you do, cite them correctly, as the example does.

Class 5 team assignment is also due by 11:59 PM on Sunday February 9<sup>th</sup>

👉 *For team assignments, please have one person from your group submit it as an **e-mail attachment** to me, rather than going through the Assignments menu item.)*

## **Class 6 – Alternative Program Approaches and Explanations for Behavior Change**

2/10-16

- Trending newer ideas and tools in the social marketing community
- Implications for marketing strategies of learnings from neuro-marketing, purpose & inspiration and design thinking
- Best use of theory

### a. Textbook Reading

Chapter 4, "Behavior Change Theories, Models, and Frameworks," pp. 83-104. This chapter, a new addition to the text, does a very nice job of summarizing many of the change theories that you encounter. **Of particular relevance to this course, the authors comment on the implications of each theory to social marketing.**

### b. Lecture

"Alternative Program Approaches and Explanations for Behavior Change"

### c. Assigned Readings and Resources

#### ***Inspiration & Purpose***

YouTube video: "Dream Rangers," by Ogilvy Asia,  
<http://www.youtube.com/watch?v=vksdBSVAM6g> (0:3:11)

YouTube video: "On Purpose," by Vic Strecher, University of Michigan School of Public Health  
[http://www.youtube.com/watch?v=TB98SSgv8\\_E](http://www.youtube.com/watch?v=TB98SSgv8_E) (0:5:10)

YouTube video: "What Inspires Behavior Change," by Vic Strecher,  
<http://www.youtube.com/watch?v=bxMGuGUROiA> (0:20:38)

### **Neuromarketing**

YouTube video: "Is There a Buy Button Inside the Brain," by Patrick Renvoise,  
<https://www.youtube.com/watch?v=rKceOe-Jr0> (0:3:11)

Lee, N. and Kotler, P. (2011). Marketing Highlight, Reducing deaths at railroad crossings in India: A neuroscience approach. In: Lee, N. and Kotler, P., *Social Marketing: Changing Behaviors for Good*. (5th edition).pp. 154-157. Los Angeles: Sage

### **Human Centered Design**

Acumen+. (2013). An introduction to human centered design. p. 5-18

Biroscak, B. J., Schneider, T., Tyson, D. M., Aguado Loi, C. X., & Bryant, C. A. (2018). Applying tools from human-centered design to social marketing planning. *Social Marketing Quarterly*, 24(2), 63–73.  
<https://doi.org/10.1177/1524500418761624>

YouTube video: "Can We Use Design to Make Life More Interesting?," by Chris Waugh, IDEO,  
<https://www.youtube.com/watch?v=rvqcS6-7tNc> (0:18:55)

- d. Assignment  
None

**\*\*Real time Class Meeting this week.** I will send you a link to a Doodle poll to determine the best day and time to meet. This is entirely optional, but previous classes have found it very enjoyable and informative!

## ***☞ Part Two: Planning a Social Marketing Intervention*** *(See [Introducing the Social Marketing Project](#), p. 23.)*

### **Class 7 – Social Marketing Project**

#### **Background & Purpose; Situation Analysis**

2/17-23

- Importance of accurately defining the problem
- Formative research is more than focus groups and surveys
- Understanding and insight

#### a. Textbook Reading

Chapter 5, "Steps 1 & 2: Social Issue, Purpose, Focus Situation Analysis," pp. 109-131

b. Lecture

“Insights on ‘Insight’ and on the Right Focus”

c. Assigned Readings and Resources

PowerPoint: PRIZM Basics.

*Listen to this PowerPoint if to learn more about PRIZM, a commercial marketing database, which a number of public health-related organizations have used (e.g., CDC, National Cancer Institute, National Highway Traffic Safety Administration; state health departments, including North Carolina, Ohio, California and Missouri). Note: there is a brief description of PRIZM on pp. 156-157 in the text.*

Tools for Research, CDCynergy-Social Marketing Edition,

<http://www.orau.gov/cdcynergy/soc2web/Content/activeinformation/tools/tools.htm>.

Click on the link and review the items on the pull-down menu.

Lee, N. and Kotler, P. (2011). Chapter 3, 16 Tips for Success. In: Lee, N. and Kotler, P., *Social Marketing: Changing Behaviors for Good*. (5th edition).pp. 154-157. Los Angeles: Sage

d. This week has *two* team assignments.

1. **Assignment for this week’s class:** Background and Situation Analysis

Complete the readings and lecture as individuals. As a team, discuss the questions for Step 1 and Step 2 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 7 assignment is due by 11:59 PM on Sunday February 23<sup>rd</sup>

☛ Remember, for *team* assignments related to the project, please have one person from your group submit it as an **e-mail attachment** to me, rather than going through the Assignments menu item.)

2. **Begin assignment for Class #8, Conducting Formative Research (Due March 1<sup>st</sup>)**

Since it would not be easy to go out and conduct primary research about your issue and potential audiences, you will do a literature review to find secondary sources. Search thoughtfully, as this will inform the interventions you develop.

To dos

- a) Identify five (5) sources that are germane to your issue or audience. Sources may include professional journal articles or reputable web sources. **Since this is a class on social marketing, work to identify at least two of your sources through these excellent social marketing resources:** 1) Social Marketing Association of North America listserv (<https://smana.org/get-involved/listserv/>), 2) International Social

Marketing Association blog  
(<https://isma.memberclicks.net/blog#.WIURN0tG1-U>), 3) Social Marketing Quarterly journal, 4) Journal of Social Marketing. You can access the journals through the Health Sciences Library's E-Journal link:  
<https://hsl.lib.unc.edu/resources/ejsearch.>)

- b) Types of information to search for
- barriers, benefits and facilitators associated with the behavior
  - social marketing interventions for similar issues
  - information that gives insight into whether any of the determinants of behavior from the NIMH consensus conference (see Class #5 lecture) is germane to your issue
  - other types of information are acceptable if you will find it useful *but remember*, this is a class on social marketing, so we need to go beyond the "same old, same old" and ask marketing questions
- c) Places to search besides the required social marketing resources, above:
- listservs for the Society of Public Health Educators (SOPHE), APHA and similar organizations
  - Google scholar
  - Medline
- d) Write a brief overview of your findings, using one of the example formats in the Class #8 folder. Include enough information so that I can see how it may be useful to you.

**Class 8 – "Your People"; Objectives & Goals;  
Barriers & Benefits**

2/24-3/1

- The myth of "the general public"
- Centrality of the concept of exchange
- Translating formative research into interventions

a. Textbook Reading

Chapter 6, "Step 3: Selecting Priority Audiences," pp. 135-163

Chapter 7, "Step 4: Behavior Objectives and Target Goals," pp. 167-188

Chapter 8, "Step 5: Audiences Insights," pp. 195-216

b. Lecture

"Audience and Exchange"

PowerPoint with voiceover: "Audience Segmentation: Separating Apples from Oranges"



c. Assigned Readings and Resources

Benefits Ladder

d. Assignment: Audience, Objectives, Barriers and Benefits

1) Submit the results of your secondary research search.

2) Complete the readings and lecture as individuals. As a team, discuss the questions for Steps 3, 4 and 5 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 8 assignments are due by 11:59 PM on Sunday March 1<sup>st</sup>

**Group Evaluation #1**—I will send you a survey about how the individuals in your group are participating. Your comments, along with my observations, will go into the grade for Individual Participation in Team. *Confidentiality is completely in place!*

Due by 11:59 PM on Sunday, March 8<sup>th</sup>

**Class 9 – Positioning & Product**

3/2-8

- Positioning—differentiating your interventions
- Introducing the “4 Ps”—the core strategies of a marketing approach
- Always more than one “product”

a. Textbook Reading

Chapter 9, “ Step 6: Crafting a Desired Positioning Statement,” pp. 223-241

Chapter 10, “Step 7: Product: Creating a Product Platform,” pp. 245-269

b. Lecture

“Introducing the 4 Ps”

c. Assigned Readings and Resources

Blog post: “The Sensuous Brand: How to create allure with products and user experience.” James D. Roumeliotis, <https://www.linkedin.com/pulse/sensuous-brand-how-create-allure-products-user-james-d-roumeliotis>

BEHAVE Model and two examples

Doing Social Marketing Grid and example

d. Assignment: Positioning and Product

Complete the readings and lecture as individuals. As a team, discuss the questions for Steps 6 and 7.1 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 9 assignment is due by 11:59 PM on Sunday March 8<sup>th</sup>

☞☞ *Group Evaluation #1* is also due by 11:59 PM on Sunday March 8<sup>th</sup>.

## **Spring Break: 6 March – 15 March (*Enjoy!*)**

### **Class 10 - Price**

3/16-22

- Making change “fun, easy and popular”
- Reducing barriers and using barriers

a. Textbook Reading

Chapter 11, “Step 7: Price: Determining Monetary and Nonmonetary Incentives and Disincentives,” pp. 273-295

b. Lecture

None

c. Assigned Readings and Resources

None

d. Assignment: Price

Complete the readings and lecture as individuals. As a team, discuss the questions for Step 7.2 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 10 assignment is due by 11:59 PM on Sunday March 22<sup>nd</sup>

### **Class 11 - Place**

3/23-3/29

- Location, time and mind-space

a. Textbook Reading

Chapter 12, “Step 7: Place: Making Access Convenient and Pleasant,” pp. 295-314

b. Lecture

“Location, Location, Location”

c. Assigned Readings and Resources

Edgar, T., Huhman, M., & Miller, G. A. (2015). Understanding “place” in social marketing: A systematic review. *Social Marketing Quarterly*. 21(4), pp. 230–248. doi: 10.1177/1524500415607453

d. Assignment: Place

Complete the readings and lecture as individuals. As a team, discuss the questions for Step 7.3 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 11 assignment is due by 11:59 PM on Sunday March 29<sup>th</sup>

**Class 12 - Promotion**

3/30-4/5

- Successful promotion is more than information
- The elements of a successful promotion strategy
- The place of social media in social marketing
- Best practice social media

a. Textbook Reading

Chapter 13, “Step 7: Promotion: Deciding on Messages, Messengers, and Creative Strategies,” pp. 319-351

Chapter 14, “Step 7: Promotion: Selecting Communication Channels,” pp. 355-391

b. Lecture

PowerPoint with voiceover: “Using Social Media in Public Health Practice”

c. Assigned Readings and Resources

Christiano, A., and Neimand, A. (2017). Stop raising awareness already. *Stanford Social Innovation Review*. Spring, 2017, 34-41. *\*\*Read pages 38ff, beginning with "Creating Awareness that Leads to Action."*

Miller, M. R., Snook, W. D., Yoder, & E. W. (2020). Social media in public health departments: A vital component of community engagement. *Journal of Public Health Management and Practice*. 26(1), 94-96. doi:

10.1097/PHH.0000000000001125.

<https://journals.lww.com/jphmp/pages/articleviewer.aspx?year=2020&issue=01000&article=00018&type=Fulltext>

(Note: Be sure to click on the reference numbers to access some very interesting resources!)

National Association of County and City Health Officials. (July, 2019). Social media toolkit: A primer for local health department PIOs and communications professionals. Washington, DC: author  
<https://www.naccho.org/uploads/downloadable-resources/Social-Media-Toolkit-for-LHDs-2019.pdf>

Handout: Social Media Resources sheet (*I will provide an updated list at the time of this class.*)

Optional, but recommended

Centers for Disease Control and Prevention. (2010). Simply put: A guide for creating easy to understand materials (3<sup>rd</sup> ed.). Atlanta: author

Goodman, A. (2002). Why bad ads happen to good causes. Los Angeles: Cause Communications

**I strongly encourage you to open and “flip through” these.** Though they are “oldies,” they still are “golden oldies.” I have found them to be tremendously helpful in developing promotional strategies that engage audiences, or helpful to at least understand what works when I talk with a creative agency. (*The Goodman piece is full of engaging visual to illustrate the guidance that you may enjoy seeing.*)

d. Assignment: Promotion

Complete the readings and lecture as individuals. As a team, discuss the questions for Steps 7.4 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

Class 12 assignment is due by 11:59 PM on Sunday April 5<sup>th</sup>

**Class 13 – Monitoring & Evaluation; Budgets; Implementation**

4/6-12

- Evaluation measures appropriate to social marketing
- Using social marketing approaches to appeal to funders

a. Textbook Reading

Chapter 15, “Step 8: Monitoring and Evaluation”  
*Introduction & Marketing Highlight, pp. 397-402*  
*What Will You Measure?, pp. 408-415*

Chapter 16, “Step 9: Budget and Funding Plans,” pp. 431-449

Chapter 17, "Step 10: Implementation and Sustaining Behavior Plans," pp. 457-478, top of page

b. Lecture

PowerPoint with voiceover: "Social Marketing on a Barefoot Budget"

c. Assigned Readings and Resources

Blog post: "The Public Health Market Planner." On Social Marketing and Social Change\*,

[http://socialmarketing.blogs.com/r\\_craig\\_lefebvres\\_social/2010/12/the-public-health-market-planner.html](http://socialmarketing.blogs.com/r_craig_lefebvres_social/2010/12/the-public-health-market-planner.html)

*\*By Craig Lefebvre (pronounced "La-fay"), a long time social marketer and public health-er. Craig doesn't think outside the box, he creates new boxes! His is the self-described "Chief Maven" of social marketing. I would agree.*

BEHAVE+My Model-School PAN example—this illustrates how to link your program interventions with evaluation metric and with resources needed.

d. Assignment: Monitoring, Budget, Implementation

Complete the readings as individuals. As a team, discuss the questions for Steps 8, 9\* and 10 on the Social Marketing Planning Worksheets, write a response to the questions and submit them.

*\*Step 9 Note:* I do not expect you to know how much it costs to complete the various strategies you are proposing. Rather, **do these two things** for questions 9.1-9.5:

- list the tasks or items you expect to have to pay for (e.g., development of a mobile phone app, transcribing of focus group recordings, etc.)
- list what percentage of your budget you want to devote to each strategy (i.e., product, price, place, etc.—*not to each task*). Remember, you have a budget of \$25,000.

Class 13 assignment is due by 11:59 PM on *Monday April 13<sup>th</sup>*

**Class 14 - Wednesday May 6<sup>th</sup>, Using Social Marketing in Your Practice**

4/13-19

- Using marketing principles in your own practice
- Building marketing capacity in your organization
- *What did you want to know at the beginning of the semester that we have not addressed?*

a. Textbook Reading

None

b. Lecture

None

c. Assigned Readings and Resources

Lagarde, F. (2009). What if your organization couldn't care less about social marketing? *Social Marketing Quarterly*, *XV* 2 pp. 105-108

Lee, N.R. (2019). The future of social marketing: Let's get it in orbit by 2025! *Social Marketing Quarterly*, *25* 4 pp. 1-11. doi.org/10.1177/1524500419889141

Newton-Ward, M. (2004). Building social marketing capacity at the state level: North Carolina's social marketing matrix team. *Eta Sigma Gamma Health Education Monograph Series 2004 on Social Marketing*, *21* 1.

d. Assignment: Reflection on Using Social Marketing (Length 2-3 pages)

Consider what you have learned about doing social marketing. Consider your current workplace or, if in class full time, consider future classes and projects (or where you imagine you might work). Reflect on the following questions, jot your thoughts and send to me: 1) what barriers do you see to using a social marketing approach; 2) what facilitators do you see; 3) what else do you want or need to feel prepared to begin utilizing marketing; 4) how can you continue to "feed your head" and develop your marketing practice; 5) what burning question(s) do you want to ask me?

**This should be very low stress for you!** Forget the APA Style Guide, for a change! Jot down your thoughts in bullet points if you want. I invite you into this space where you can think about "what next?" and get some wisdom (?) from me.

Class 14 assignment is due by 11:59 PM on Sunday April 19<sup>th</sup>

**\*\*Real time Class Meeting this week.** I will send you a link to a Doodle poll to determine the best day and time to meet. This is entirely optional, but previous classes have found it very enjoyable and informative!

## Final Project Feedback & Technical Assistance

4/20-5/1

- Compilation of social marketing plan components
- Final formatting and editing
- Questions for the instructor

**Final Social Marketing Project** due on or before 11:59 PM, **Friday, May 1<sup>st</sup>**.

**Group Evaluation #2**—I will send you the survey.

Due by 11:59 PM on **Saturday, May 2<sup>nd</sup>**

## Introducing the Social Marketing Project

The majority of the class will give you the opportunity to learn social marketing by doing social marketing. The textbook is designed to take you through the steps of the social marketing process, beginning with Chapter 5. The text provides planning sheets keyed to each chapter in Appendix A, beginning on page A-1. **I have posted the planning sheets in Word format in the Class #7 folder in Sakai. Further, I will provide a well-done final project from a previous year to serve as a template for your final project**

All the work is done in a team, as you did for the field trip assignment. You will complete the steps sequentially and weave them together into a final plan. I will not grade the steps, only the final plan. However, I will read and give feedback on each step. (As an artifact of the class schedule, you will begin working on each step before you receive my feedback about the previous step. However, you will be able to incorporate my feedback before submitting the final plan.)

### Process

- 1) Complete the class readings, discuss the questions in the planning step(s) for that week, write a team response, and submit it through Sakai. *Please submit only the sheet(s) for the step(s) you are working on in a given week.*
- 2) I will review your work for each step and give you feedback and suggestions.
- 3) Revise each step with my suggestions in mind. (While you don't *have* to incorporate all my suggestions, please demonstrate that you have considered them.)\*
- 4) Combine the worksheets into a final plan document, with a narrative flow.
- 5) Fill out and include for your project **one** of these worksheets: BEHAVE Model (Class #9) or BEHAVE+My Model (Class #13). Blank copies of each are in the Project Folder. *You may include these in a reference section for your plan—i.e., it does not count against your 20-page limit.*

\*Some teams have preferred to incorporate my edits and recommendations as they go along. Others have done so at the end of the project. I have given you the two weeks of April 20<sup>th</sup>–May 1<sup>st</sup> to ask me questions, finalize your plan, and make it amazing!

**Budget.** You have a budget of \$25,000. You will receive funding in May 2020 for one year.

**What your final project will look like.** I have posted an example plan from a previous class in the folder for Class #7.

### **Formatting & Length of Final Plan**

- Keep or delete headers from the planning sheets as you need to, in order to let your paper flow, while guiding the reader through the sections
- Use APA Stylebook formatting
- Twenty (20) pages, double spaced (space-and-a-half is acceptable), 12 pt. font size. (You may use additional pages for appendices that include references, examples, logic models, etc.)

### **Here's what I'm looking for:**

- A concise problem description that clearly explains the factors that contribute to your problem and where and how your behavior fits into this model
- Your secondary research must inform most of the major programmatic decisions that you make
- Clear, simple descriptions of your primary target audience and any secondary target audiences
- Clear and simple behavioral objective(s)
- A **mix** of interventions (think 4 Ps) that reduces the behavioral barriers that you have identified and that provides the relevant benefits necessary to support the desired behavior
- A logical consistency that links the steps of you plan—i.e., “it all hangs together!”

\*It's okay to make reasonable assumptions. You don't need to prove them, but you must state them clearly.

Finally, the purpose of this class is for you to demonstrate that you know how to use this model—even (and maybe especially) on a small scale. Avoid being overly ambitious with your plan.

### **Free social marketing tips:**

- Behavior change is hard
- Over-reliance on communication is bad



- Making change fun, easy and popular is good
- Contact me with any questions you have!

## **Valuing Diversity**

This class follows principles of inclusion, respect, tolerance, and acceptance that support the values of diversity.

Promoting and valuing diversity in the classroom enriches learning and broadens everyone's perspectives. Inclusion and tolerance can lead to respect for others and their opinions and is critical to maximizing the learning that occurs in this course. The results can create a sense of community and promote excellence in the learning environment. Additionally, public health has a strong social justice component that values diversity of individuals, communities and cultures.

Diversity includes consideration of: (1) the variety of life experiences other have had; (2) factors related to "diversity of presence", including, among others, age, economic circumstances, ethnic identification, disability, gender, geographic origin, race, religion, sexual orientation, social position.

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