

Social Marketing Campaigns

JOMC 671.1 | Spring 2014

Instructor: Dr. Christina Malik
Office Hours: By appointment
Email: cmalik@unc.edu

Class: Mon. and Wed. 6:15 pm to 7:30 pm
Location: Carroll 283
Course Web Site: <http://sakai.unc.edu>

Note: The course syllabus is a general plan for the course; changes announced to the class by the instructor may occur.

Course Description

Social marketing is the application of marketing concepts and practices to bring about behavior change for a social good. Social marketing is an approach to planning and implementing projects and programs that emphasizes a customer-centered mindset to learn what people want and need to change their behavior. Social marketing is NOT expressly about 'social media' or 'social networking' – although we may discuss the role of vehicles such as Facebook or Twitter in mobilizing opinion and behavior. Social marketing is not entirely about social issue *advertising* because this may not always be the most effective or efficient way to achieve the objectives. As a result, social marketing overlaps with areas of PR, lobbying, direct marketing, education and entertainment using a mix of techniques from the conventional to the innovative.

In the first part of the course we will cover the basic tenets of social marketing and how it differs from commercial sector and non-profit marketing. We will move at a quick clip, so keep up! Students will be placed into teams to work with a public health client to conduct formative research, develop a social marketing strategy, create and test campaign materials, and present a final plan of action to the client.

Course Objectives

By the end of the course, students should be able to:

- Define and identify appropriate applications of social marketing to health issues;
- Articulate the principles and methods used in social marketing;
- Describe behavioral theories that can be applied to a project using a social marketing approach;
- Apply the ten-step social marketing planning process to develop a campaign for a real-world public health challenge. This will include:
 - Conducting a situation analysis.
 - Conducting formative audience research and writing a research report for the client.
 - Developing a social marketing strategy that addresses all four P's (product, price, place, promotion).
 - Designing and testing social marketing materials/concepts with members of the target audience.
 - Writing a social marketing campaign plan that includes monitoring, evaluation, budget and implementation schedule.
 - Presenting the plan to the client.

Required Text

- Lee, N. & Kotler, P. (2011). *Social Marketing: Influencing Behaviors for Good* (4th Edition)
- Additional readings posted to Sakai.

Requirements for the Course

The requirements for the course are designed to provide you with the concepts and experiences needed to meet the above-stated objectives. You are required to:

- As an individual,
 - Attend all class and team meetings.
 - Read assigned material – this is front-loaded in the semester and we will move at a quick pace.
 - Complete online training in research with human subjects at <https://citiprogram.org>.
 - Analyze a social marketing initiative/campaign/case.
 - Write a reflection paper based on your experience with formative research.
 - Complete peer evaluations.
- As a part of a team,
 - Prepare and submit a formative research proposal.
 - Conduct formative research with members of the target audience and write a report.
 - Prepare and submit a message testing research proposal.
 - Conduct message testing of campaign materials with members of the target audience and write a report.
 - Create a social marketing campaign plan for the client.
 - Present your campaign plan to the client(s).

Class Organization

The campaign plans will be developed using an “agency team” approach and the class will be divided into two teams; each team will address a different public health issue. We will frequently gather to discuss and reflect on progress and experiences for each of the two assignments; the goal is to learn from one another.

Each team will conduct a situation analysis and primary research. Teams will present their analysis and subsequent social marketing strategy to the client and members of the other team. Each team will then develop a social marketing campaign that flows from that strategy. Deliverables include a plan that outlines strategy and tactics, budget, and ROI objectives, a creative deck, and a formal presentation to the client.

Human Subjects Research Certification (CITI)

Each student will need to complete online certification in conducting human subject research. The format includes reading material and taking related quizzes for each section. You can conduct this in one sitting in about 3 hours but you can also complete one or more section at a time and return to complete subsequent sections. Upon successful certification, please print out the documentation of completion and file the PDF in the Assignments section of Sakai no later than **Wednesday, January 15th**.

Social Marketing Initiative Analysis

Choose a health-related intervention that used a social marketing approach (in some cases it may have been called a media campaign). Describe the effort including 1) project’s goals and objectives, 2) target audience, 3) theory(ies) used, if mentioned, 4) channels used (media, interpersonal, events, promotions, etc.), 5) specific messages used, 6) evaluation method used, if mentioned, (i.e., how was the campaign tested for effectiveness – e.g., pre & post surveys, key informant interviews), 7) results reported by the evaluation, including (if possible) the % of target market reached and the % who changed their behavior, 8) any recommendations the authors may have made, and 9) at least 2 references.

The analysis should be 2-3 pages single-spaced. Please use APA citation style. Upload to the assignment section of Sakai **by 6:15 pm Wednesday, January 29th**. Examples can be found in from case studies section of <http://www.nsmcentre.org.uk>, the CDC Web site, or the journal *Social Marketing Quarterly*. Some

examples include: truth, the Anti-Drug campaign, Back to Sleep, folic acid campaign, or one you have seen on TV or some other media.

Formative Research Plan & Report

Each team will conduct formative research to better understand the motivations and perceptions of the target audience for their campaign. You can select from the following methods: focus groups, individual interviews, or interviews with dyads or triads. Major components of the project are: 1) plan for the research (e.g., issue, background, subjects, topic areas, setting, and incentives, recruitment), 2) consent to participate, 3) moderator guide (the actual introduction and questions written out), 4) actually conducting the focus group or interview, 5) transcribing the focus group or interview interactions, 6) writing research report of findings (i.e., themes with ample quotes to support the findings) and 7) a debrief/reflection (i.e., analyze the process, what went well, what did not, what would you do differently. Components 1-6 are to be completed by the team; component 7 will be completed individually by each student. Items 1-3 will be completed using the UNC IRB application form.

- **Plan/IRB Application (components 1-3) Due: Wednesday, February 5th at 6:15pm**
- **Report (component 6) Due: Friday, March 7th by 5pm**
- **Reflection Paper (component 7) Due: Wednesday, March 19th by 6:15pm**

Message Testing Research Plan & Report

Each team will develop 2-3 creative concepts and executions to test with members of the target audience via intercept interviews or an online survey. Major components for this step include: 1) plan for the research (e.g., issue, background, subjects, topic areas, setting, and incentives, recruitment), 2) consent to participate, 3) moderator guide (the actual introduction and questions written out), 4) actually conducting the focus group, and 6) a research report of findings (i.e., themes with ample quotes to support the findings) which will inform the final creative.

- **Plan/IRB Application (components 1-3) Due: Monday, March 24th at 6:15 pm**
- **Report (component 5) Due: Wednesday, April 16th at 6:15 pm**

Plans Books

Each team will turn in **2** hard copies of its written plan by **9pm on Friday, 5/2** and also submit an electronic copy to the Assignment section of Sakai. The plan should follow the outline provided in the "Projects" folder on Sakai.

Final Presentations

On **Tuesday, May 6th from 7 to 9pm**, teams will give a professional presentation to a panel of judges from the North Carolina Division of Public Health. Judges will ask questions at the end of each presentation and then convene privately to discuss the campaign and recommend final grades. In many cases the success of your presentation rests on your ability to respond thoughtfully, intelligently and thoroughly to questions.

Peer Evaluations

The peer evaluation is a major component of all students' final grades. Each person on a team must confidentially evaluate other team member's activities and contributions during the semester using the form I will provide. Peer Evaluations will be **due via email to me by 11pm Tuesday, May 6th**. Your peers' evaluation of your contributions will be worth 15% of your final grade. Please do not hesitate to post poor scores for teammates who have not carried their weight. The final project is worth 40% of the course grade and I need to be able to bring the grades down for those who have not done their fair share of the work.

Grading Policy

There is a team and individual component to the grade you will receive for this course. Sixty-five percent of your final grade will be based on the work you do with your team and 35% of your final grade will be based on your individual performance. Evaluation components will be weighted as follows:

CITI Training (1/15)	5%
Social Marketing Initiative Analysis (1/29)	10%
Formative Research Report (3/7)	15%
Research Reflection (3/19)	5%
Message Testing Research Report (4/16)	15%
Peer Evaluations (5/6)	15%
<u>Final plans book (5/2) & Presentation (5/6)</u>	<u>35%</u>
TOTAL	100%

Undergraduate Grading Scale:

A = 93-100%	C+ = 77-79%	F = <66%
A- = 90-92%	C = 74-76%	
B+ = 87-89%	C- = 70-73%	(Graduate Students will receive an H, P, or L)
B = 84-86%	D+ = 67-69%	
B- = 80-83%	D = 60-66%	

Graduate Grading Scale:

Final graduate course grades are H, P, L, F. If you are trying to understand what graduate grades mean, here’s a general description:

- H means a truly outstanding performance in the class and on assignments.
- P is a good, solid performance overall in the class and on assignments.
- L is a performance in the class and on assignments that is below the acceptable level for graduate students. It means the student does not understand the course material very well, does not have a grasp of what is required in this area at the graduate level, is not participating in the class at the level expected of graduate students, or has not handed in all papers or participated in all assignments.
- F is failing. It is given rarely in the circumstance that a student has not handed in H, P, L graded assignments.

Reimbursable Expenses

Each team will receive an allowance to help cover outside costs associated with the project, *provided you follow the procedures outlined on the form*. Examples of appropriate expenses include but are not limited to, printing or production costs associated with the campaign plan and presentation, research-related expenditures on participant incentives, refreshments for focus groups, and travel expenses. **Expenditures must be discussed with me in advance so the proper paperwork can be submitted; processing time is approximately 2 WEEKS.** I must receive timely receipts and documentation as outlined. **ALL REIMBURSEMENT DOCUMENTATION MUST INCLUDE ORIGINAL RECEIPTS. PLEASE ATTACH THESE SECURELY!!!**

Honor Code:

It is expected that each student will conduct himself or herself within the guidelines of the University honor system (<http://honor.unc.edu>). All academic work should be done with the high levels of honesty and integrity that this University demands. You are expected to produce your own work in this class,

which includes outside writing assignments. Use of former students' writing assignments constitutes a breach of the honor code and will be dealt with accordingly. If you have any questions about your responsibility or your instructor's responsibility as a faculty member under the Honor Code, please see the course instructor or Senior Associate Dean Chris Roush, or you may speak with a representative of the Student Attorney Office or the Office of the Dean of Students.

Seeking Help:

If you need individual assistance, it is your responsibility to meet with the instructor during office hours or to set up an appointment for another time. If you are serious about wanting to improve your performance in the course, the time to seek help is as soon as you are aware of the problem – whether the problem is difficulty with course material, a disability, or an illness.

Diversity:

The University's policy on Prohibiting Harassment and Discrimination is outlined in the 2011-2012 Undergraduate Bulletin <http://www.unc.edu/ugradbulletin/>. In summary, UNC is committed to providing an inclusive and welcoming environment for all members of our community and does not discriminate in offering access to its educational programs and activities on the basis of age, gender, race, color, national origin, religion, creed, disability, veteran's status, sexual orientation, gender identity, or gender expression or disabilities.

Special Accommodations:

If you require special accommodations to attend or participate in this course, please let the instructor know as soon as possible. If you need information about disabilities visit the Department of Disability Services website at <http://disabilityservices.unc.edu/> or call (919) 962-8300.

Social Marketing Campaigns/Spring 2014 – Class Schedule

Weeks	Topic/Deliverables	Required Reading
Week 1 1/8	Topic: Introduction to the course Due (1/10 by 5 pm): 1) Student Information Sheet (See Sakai)	January 8 None
Week 2 1/13 & 1/15	Topic: Overview of the social marketing approach and beginning the planning process <ul style="list-style-type: none"> • Assign Project Teams Due (1/15): 1) CITI Training (See Sakai)	January 13 L&K: 1-3 Sakai Readings January 15 L&K: 4-5 Start Team Research & Readings
Week 3 1/22	Topic: Audience research; segmentation and audience selection; behavior goals Topic: Benefits, barriers and competition	January 22 L&K: 6-8 Sakai Readings
Week 4 1/27 & 1/29	Topic: Behavioral and health communication theories Project Kick-Off (CLIENTS IN CLASS ON 1/29) Due (1/29): 1) Social Marketing Initiative Analysis (See Sakai)	January 27 Sakai Readings January 29 Team Research & Readings
Week 5 2/3 & 2/5	Writing a formative research plan: What do you know ... and what do you need to find out? Formative Research Consults (2/5): <ul style="list-style-type: none"> • WIC Team @ 6:15pm • EHDl Team @6:50pm Due (2/5): 1) Formative Research Plan/IRB Application (See Sakai)	February 3 Sakai Readings February 5 <i>In-class consults</i>
Week 6 2/10 & 2/12	Topic: Strategy & Campaign Development <ul style="list-style-type: none"> • Positioning, brand and product • Price and Place 	February 10 L&K: 9-10 Sakai Readings February 12 L&K: 11-12

<p>Week 7 2/17 & 2/19</p>	<p>Topic: Strategy & Campaign Development</p> <p>Promotion</p> <ul style="list-style-type: none"> In-class exercise: Step 7.4 <p>Topic: Implementation, Monitoring & Evaluation</p> <ul style="list-style-type: none"> In-class exercise: Step 8 	<p>February 17 L&K: 13-14 Sakai Readings</p> <p>February 19 L&K: 15-17</p>
<p>Week 8 2/24 & 2/26</p>	<p>Topic: Conduct Research</p>	<p>February 24</p> <p>February 26</p>
<p>Week 9 3/3 & 3/5</p>	<p>Topic: Write Research Report</p> <p>Research & Strategy Consults (3/5):</p> <ul style="list-style-type: none"> WIC Team @ 6:15pm EHDI Team @6:50pm <p>Due (3/7): 1) Formative Research Report (See Sakai)</p>	<p>March 3 <i>In-class work session</i></p> <p>March 5 <i>In-class consults</i></p>
<p>Week 10 3/10 & 3/12</p>	<p>Spring Break</p>	
<p>Week 11 3/17 & 3/19</p>	<p>Topic: Research and Strategy</p> <p>Research Presentations to Clients (CLIENTS IN CLASS ON 3/17)</p> <p>Due (3/19): 1) Individual Reflection Papers (See Sakai)</p>	<p>March 17 <i>Client Presentations</i></p> <p>March 19 <i>In-class work session</i></p>
<p>Week 12 3/24 & 3/26</p>	<p>Topic: Strategy & Program Development</p> <p>Message Testing Plan Consults (3/24):</p> <ul style="list-style-type: none"> WIC Team @ 6:15pm EHDI Team @6:50pm <p>Strategy & Program Development Consults (3/26):</p> <ul style="list-style-type: none"> WIC Team @ 6:15pm EHDI Team @6:50pm <p>Due: 1) 3/24: Message Testing Research Plan/IRB Application (See Sakai) 2) 3/26: Positioning Statements and Briefs (3/26)</p>	<p>March 24 <i>In-class consults</i></p> <p>March 26 <i>In-class consults</i></p>
<p>Week 13 3/31 & 4/2</p>	<p>Topic: Message-Testing Plan & Message Development</p> <p>Message Testing Consults (4/2):</p> <ul style="list-style-type: none"> WIC Team @ 6:15pm EHDI Team @6:50pm 	<p>March 31 <i>In-class work session</i></p> <p>April 2 <i>In-class work consults</i></p>

<p>Week 14</p> <p>4/7 & 4/9</p>	<p>Topic: Conduct Message Testing/Write Report</p>	<p>April 7</p> <p>April 9</p>
<p>Week 15</p> <p>4/14 & 4/16</p>	<p>Topic: Finalize Campaign Plans</p> <p>Final Plan Consults (4/14):</p> <ul style="list-style-type: none"> • WIC Team @ 6:15pm • EHDl Team @6:50pm <p>Due (4/16):</p> <p>1) Message Testing Reports (See Sakai)</p>	<p>April 14</p> <p><i>In-class consults</i></p> <p>April 16</p> <p><i>In-class work session</i></p>
<p>Week 16</p> <p>4/21 & 4/23</p>	<p>Topic: Finalize Campaign Plans and Presentations</p> <p>Due:</p> <p>1) 5/2: Plans due electronically and in print (See Sakal)</p>	<p>April 21</p> <p><i>In-class work session</i></p> <p>April 23</p> <p><i>In-class work session</i></p>
<p>Final Exam</p> <p>5/6</p> <p>7:00 – 9:00</p> <p>PM</p>	<p>Present Final Plans to Clients (CLIENTS IN CLASS ON 5/6)</p> <p>Due (5/6):</p> <p>1) Peer Evaluations (See Sakal)</p> <p>2) Electronic Version of Presentation</p>	<p>Client Presentations</p>