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Proven Marketing Strategies for SOAR Sustainability

PRESENTED BY:

SAMHSA SOAR TECHNICAL ASSISTANCE CENTER POLICY RESEARCH ASSOCIATES, INC.

UNDER CONTRACT TO: SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES





Disclaimer

- This training is supported by the Substance Abuse and Mental Health Services Administration (SAMHSA) and the U.S. Department of Health and Human Services (DHHS)
- The contents of this presentation do not necessarily reflect the views or policies of SAMHSA or DHHS.
- The training should not be considered substitutes for individualized care and treatment decisions.





Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Evaluation
- Question instructions





Learning Objectives

- Learn about effective marketing tools from the SAMHSA SOAR TA Center to help you share stories of your SOAR successes
- Understand why marketing your SOAR program is essential to sustainability
- Learn how to build your own graphics with FREE tools!
- Understand how Maryland successfully uses various strategies to market and sustain their SOAR initiative at the state and local levels





Agenda

Share the Success of Your SOAR Program Using SOAR Tools

- Holley Davis, Communications Specialist, Policy Research Associates, Inc., Delmar, New York
 Funding Toolkit for Sustainability
- Matt Canuteson, MA, Project Associate, SAMHSA SOAR TA Center, Policy Research Associates, Inc., Delmar, New York

Growing and Sustaining SOAR in your State and Community

- Caroline Bolas, MSW, MS, Maryland SOAR State Lead, Maryland Department of Health, Behavioral Health Administration, Baltimore, Maryland
- Rich Schiffauer, BS, Adult Services Program Manager, SOAR Local Lead, Montgomery County Health and Human Services, Local Behavioral Health Authority, Rockville, Maryland

Questions & Answers

Facilitated by SAMHSA SOAR TA Center Staff





Share the Success of Your SOAR Program Using SOAR Tools

HOLLEY DAVIS COMMUNICATIONS SPECIALIST POLICY RESEARCH ASSOCIATES, INC.





Talking Points

- •Understanding the need for a marketing strategy
- Accessing tools from the SOAR TA Center
- Using free and low-cost tools to build graphics and websites
- Diving into social media
- Delivering powerful presentations





Marketing Your SOAR Program is Essential for Program Sustainability



TOOLS FROM THE SAMHSA SOAR TA CENTER

and the second second



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WORKS

Build Your Marketing Toolkit with Ready-made **SOAR** Resources

OAR WORKS × samhsa SSI/SSDI OUTREACH, ACCESS, AND RECOVERY: AN OVERVIEW



THE ISSUE

Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) are disability income benefits administered by the Social Security Administration (SSA) that also provide Medicaid and/or Medicare health insurance to eligible individuals. The application process for SSI/SSDI is complicated and difficult to navigate. Nationally, about 28 percent of individuals who apply for these benefits are approved on initial application and appeals take an average of 1 year to complete.

For people who are experiencing or at-risk of homelessness or who are returning to the community from institutions (jails, prisons, or hospitals), access to these programs can be extremely challenging. Approval on initial application for people who experiencing or at-risk of homelessness and who have no one to assist them is about 10-15 percent. For those who have a mental illness, substance use issues, or co-occurring disorders that impair cognition, the application process is even more difficult - yet accessing these benefits is often a critical first step in recovery.

A SOLUTION

Ê

The Substance Abuse and Mental Health Services Administration (SAMHSA) developed the SSI/SSDI Outreach, Access, and Recovery (SOAR) model to address this critical need. SOAR-trained case managers submit complete and guality applications that are approved guickly. The SOAR TA Center provides a three-step approach to SOAR implementation:

STRATEGIC PLANNING

Strategic planning meetings bring key state/local stakeholders (e.g., SSA and Disability Determination Services (DDS); State Mental Health Agency and Department of Corrections leadership; and community homeless, health, and behavioral health providers) together to collaborate and agree upon a SOAR process for the submission and processing of SSI/SSDI applications and develop an action plan to implement their SOAR program.

TRAINING LEADERS

Training of case managers using the SOAR Online Course. This free, web-based course includes the development of a practice case using a fictional applicant. A Leadership Academy program creates strong local leaders to support SOAR-trained case managers and coordinate local SOAR programs.

TECHNICAL ASSISTANCE

Individualized technical assistance for supporting action plan implementation, identifying funding opportunities for sustainability, developing quality review procedures, and assisting with tracking outcomes to document success and identify areas for improvement and expansion.

OUTCOMES



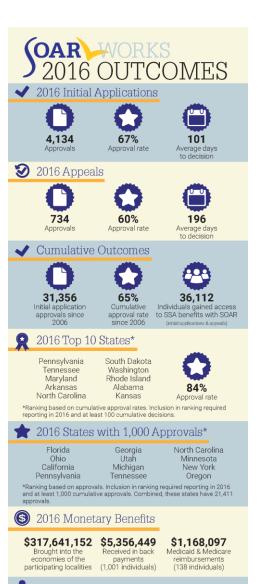


Since 2006, over 31,356 initial SOAR SSI/ SSDI applications have been approved.

The 2016 approval rate on initial SOAR In 2016 alone, SSI/SSDI brought at least applications averages 67 percent in \$317,641,152 into the economies of the 101 days.

participating localities

For more information, e-mail us at soar@prainc.com or visit https://soarworks.prainc.com/



2016 Employment

103 People working at the

time of application

\$40,973

Total additional

income

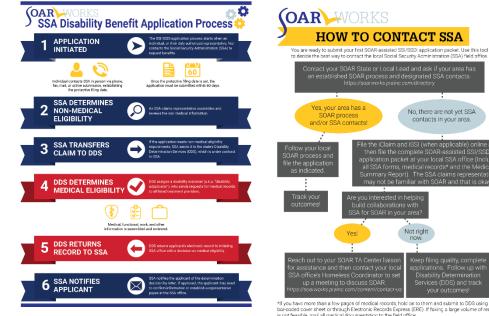


OAR WORKS

Use Tools from the SAMHSA SOAR TA Center to Explain the SOAR Process









Not right

No, there are not vet SSA

contacts in your area.

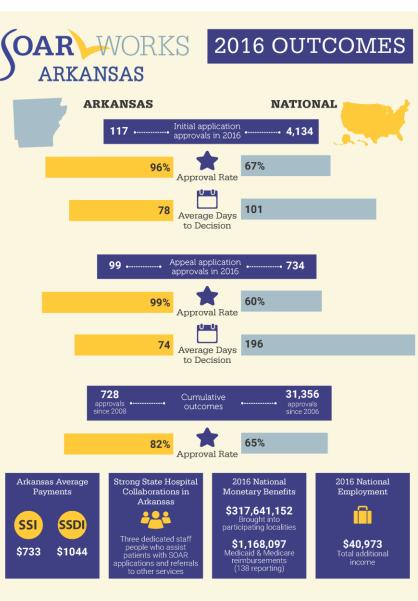
*If you have more than a few pages of medical records hold on to them and submit to DDS using a bar-coded cover sheet or through Electronic Records Express (ERE). If faxing a large volume of records is not feasible, mail all medical documentation to the field office.



(OAR) WORKS

Use Resources from the SAMHSA SOAR TA Center to Share Stories of Success

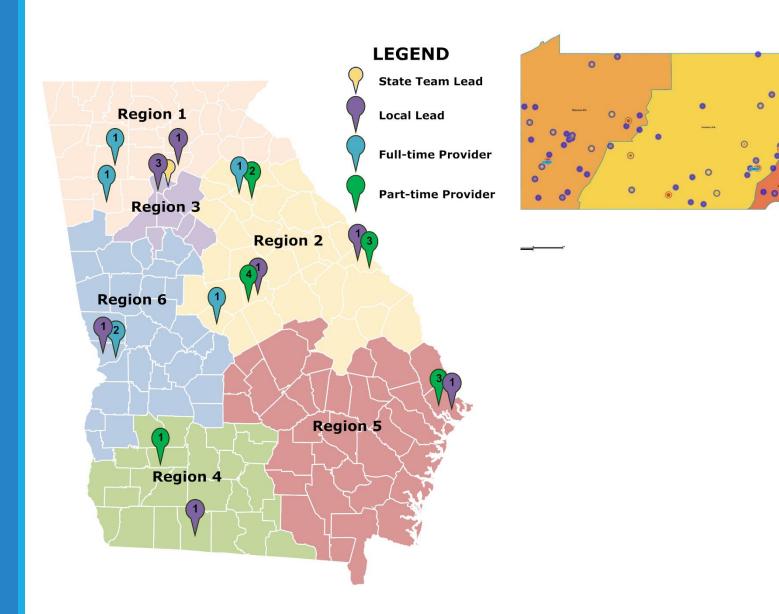








State Leads, Share the Statewide Impact of SOAR!



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eSpatial







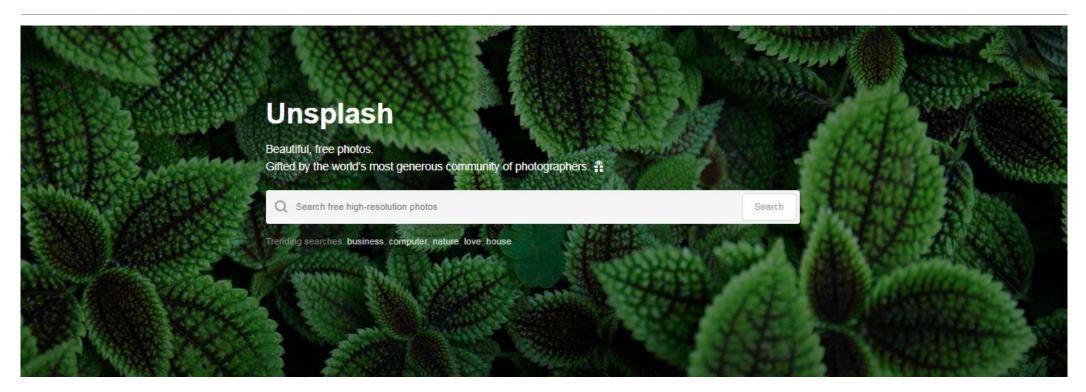
Build Your Own Graphics with FREE Tools

(OAR) WORKS





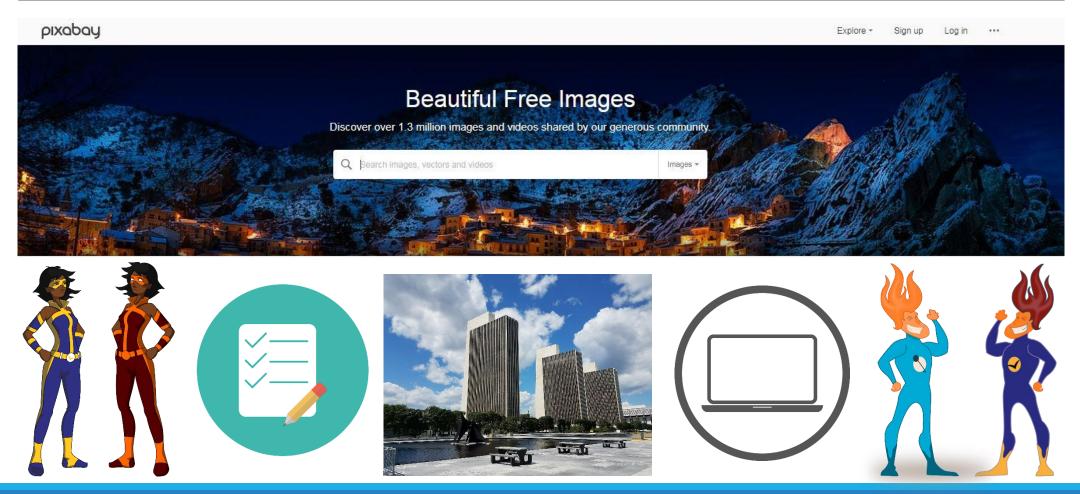
Soar Use Unsplash to Uncover Beautiful, Free Stock Photos



Pro tip: Use more abstract search terms to find images



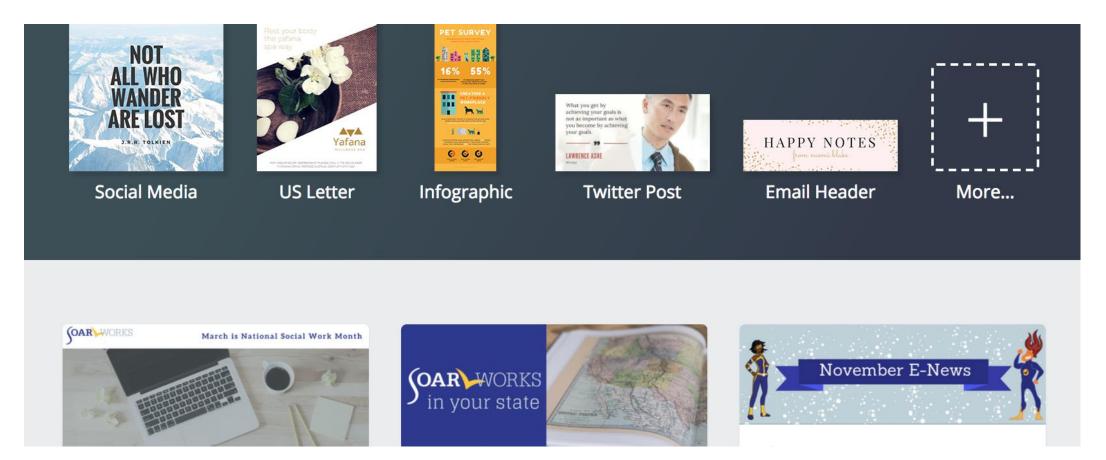
JOAR WORKS Use <u>Pixabay</u> to Pick Pictures, Vectors, and Illustrations





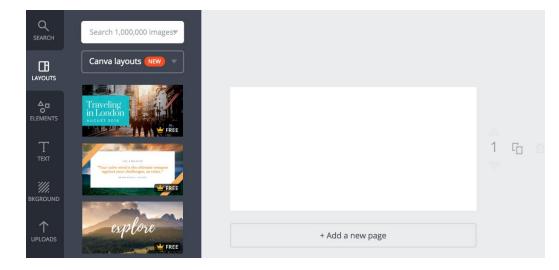


Create Cool Graphics with Canva



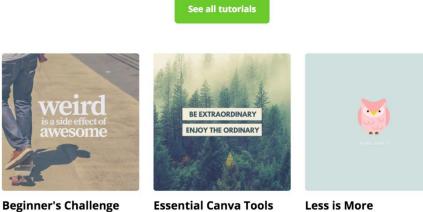


Canva Provides Tutorials and Templates to Produce Quality Pieces



Getting Started with Canva

Fast-track your ability to create amazing designs by completing the Design Essentials tutorials course.



Essential Canva To See details

See details

Less is More See details



Build A Website With Low-Cost Tools



SQUARESPACE

(OAR) WORKS









DIVING INTO SOCIAL MEDIA



(OAR)-WORKS

It's Time to Start Using Social Media 30% of all time online is spent or social media



Keys to Success: Start Small, Have a Plan, Be Authentic, and Post Consistently



OAR WORKS

Track Your Data to Improve Your Messaging

28 day sumn	nary with change over	r previous period					
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TWEET HIGHLIGHTS						JAN 2018 SUMMARY	
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SHARE WIDELY – Calling all students! Policy Research Associates is seeking a graphic design communications #intern for this spring and summer! Learn more and apply on the PRA website: prs.tw/zrji30xAlQg plc.twitter.com/uKvi34R3gD		Wisconsin SPD BYTE CONSISTO Jan 16 Tom Reed. SPD's Milwaukee Trial Regional Atty Mgr, participated today in Congressional briefing on "Trauma and Jalis" in Wash D.C. Moderated by @verainstitute, 4-person panel addressed			Profile visits. 87	Mentions 1	
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All Posts Published

Overview

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Likes

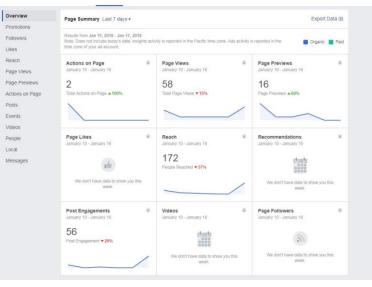
Reach Page Views

Posts Events Videos

People

Local Messages







(OAR WORKS

DELIVERING POWERFUL PRESENTATIONS





Build a Presentation You Want to Sit Through

- Use 3 or fewer bullets per slide, 20 or fewer words
- Structure your presentation on messages
- Integrate images to illustrate your ideas
- Provide one-sheets with supplementary information





Don't start with doom and gloom

A convincingly dark picture makes solutions seem too dim to matter



Share solutions

Show them what success looks like—perhaps a success story—and then tell them the problems it avoids

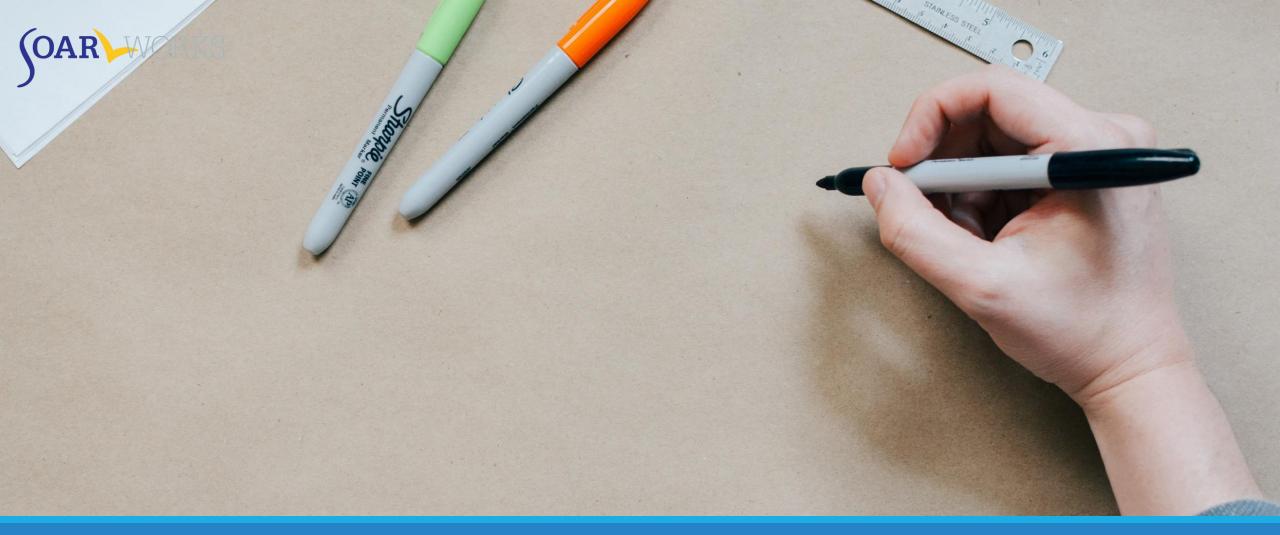






Life, liberty, and the pursuit of stickiness Alliteration always arrests attention <u>A rhyme might feel lame</u>, but it works all the same





Keep Your Slides Simple and Clear for Maximum Retention





Liked What You Saw and Want to Learn More?

Contact your SOAR Liaison to get started!







Marketing/Funding Toolkit for Sustainability

MATT CANUTESON PROJECT ASSOCIATE SAMHSA SOAR TA CENTER POLICY RESEARCH ASSOCIATES INC.





Marketing/Funding Toolkit for Sustainability



Creating your own SOAR website

SOAR programs across the nation are looking for new and exoiting ways to inform government officials, potential funders, and stakeholders about the work that SOAR is doing to help people who are at-risk or experiencing homelessness access Social Security benefits. The purpose of this online toolkit is to help your SOAR program get information out about the work you do, and to help you access funding from foundations, private donors and businesses operating in your communities.

This toolkit is divided up into different easy-to-access pages so that you can effortlessly find the information and resources you need.

INCREASING YOUR ONLINE PRESENCE

Most people initially find the information they are looking for on the internet. It is important that you inform stakeholders (i.e. legislators, community service providers, potential volunteers and funders) about the amazing work you do in your community via the web. This tab includes information and





Strategies for Growing and Sustaining SOAR

CAROLINE BOLAS MARYLAND SOAR STATE LEAD





Engaging providers

- In order to grow SOAR and obtain funding, often there is a need to show SOAR is successful, but it is hard to prove success without funding
- Even with funding, it probably won't cover all needs
- A key strategy needs to be getting/keeping providers and key stakeholders on board, even without dedicated SOAR funding





Using a Systems Approach

- Negative perceptions of a program can be hard to overcome and can make marketing problematic
- It helps to have a systematic approach to growing SOAR
- Effectively establishing SOAR in one area allows you to build on success – word of mouth can be the most effective marketing tool





Importance of Data as Marketing Tool

- Collect and emphasize the importance of data right from start
- Ensure you share data with providers and key stakeholders on a regular basis – not just annually
- Work with Disability Determination Services (DDS) to get comparison data
- Look at gathering longer term outcomes





Importance of Storytelling as a Marketing Tool

Collect and share success stories demonstrating impact of gaining benefits, for example:

- Write a blog
- Include in newsletters
- Ask successful applicants to speak to work groups or key stakeholders
- Produce a video





Quality Applications as a Marketing Tool

Emphasize from the start the importance of high quality applications through the following examples:

- Quality Review processes
- Work group meetings and refresher training
- Feedback from SSA/DDS
- Outcome data
- SOAR Certification and Recertification
- Annual conference





SOAR Certification Criteria

- Complete SOAR training
- Complete at least 5 SOAR applications, at least 4 of which must be approvals
- Submit self assessment form and 5 medical summary reports and corresponding data forms
- Applications reviewed by *Certification Review Committee* and written feedback provided to applicant
- After 2 years, <u>must</u> apply for recertification





Benefits of SOAR Certification

- Helps ensure quality applications
- Opportunity to recognize achievement
- Provides providers with evidence of professional development
- Helps enhance engagement and commitment to SOAR
- Provides a mechanism for obtaining feedback on what is working well, as well as, challenges being experienced





SOAR Conference

- Brings providers, stakeholders together
- Enables continuing professional development
- Provides opportunities for certified case managers to present on a panel or a workshop
- Chance to recognize achievement "SOAR Value in Action Awards" and "Hall of Fame"
- Opportunity to market SOAR to new agencies
- Creates greater sense of community





Creating SOAR Community

- Celebrate successes
- Actively seek opportunities to recognize effort, as well as, achievement
- Act quickly to deal with issues
- Model a culture of positivity rather than focus on negative aspects
- Remember, word of mouth can beat glossy marketing tools— "Advocates can be the best marketing tool!"





Leading A Successful Local SOAR Initiative: Role of the SOAR Lead

RICH SCHIFFAUER MARYLAND SOAR LOCAL LEAD AND TRAINER





SOAR: Part of the System

- SOAR is "systems connected," it is not done in a vacuum
- SOAR is connected to PATH, COCs, HUD-VASH, and other programs
- Utilize the supports of your State SOAR Lead/National SOAR TA Center Liaison
- Important to identify key stakeholders before starting
- Identify how much time you are able to dedicate to SOAR lead duties





Marketing SOAR to Obtain Buy-In

- Identify who to outreach homeless and behavioral health providers, corrections, VA, etc.
- Obtain buy-in from Agency Directors
- Sell benefits of SOAR, but don't oversell be realistic about time commitment SOAR takes
- Do presentations to build enthusiasm
- Ensure direct service providers are also involved in work group meetings





The Initial Workgroup Meetings

- Have attendees participate in the development of the SOAR process for your area which helps with buy-in
- Develop specific referral process with SSA/DDS
- Identify how often the workgroup will meet
- Encourage consensus when making group decisions
- Keep promoting enthusiasm for SOAR
- Be realistic about time commitment of all involved





Preparation is Key!

- Obtain agreement from medical providers on signing Medical Summary Reports (MSRs)
- Communicate with local treatment providers on benefit of supplying medical records
- Set up processes with key partners, e.g.) Corrections, VA, homeless providers, etc.
- Set up a tracking log for SOAR referrals
- Set up a training between DDS and medical providers to discuss medical determination criteria





Medical Providers Training

- Included presentations by DDS's Chief Psychiatric and Medical Consultants
- Focus on DDS's evidentiary requirements and adjudication processes
- Primary Care doctors serving applicants experiencing homelessness and psychiatrists from behavioral health agencies participated
- Training kept to 3 hours so not too much impact on billable hours





Leading for Success

- Screen referrals it is worth the time spent!
- Review Medical Summary Reports before they are sent to DDS – promptly turn around the feedback
- Promptly respond to questions/concerns: OK to say will find out if don't know the answer
- Provide technical assistance as needed to SOAR providers
- Maintain effective communication with DDS and SSA
- Immediately take any systemic issues to State SOAR Lead





Leading for Success

- Use workgroup to continually review SOAR procedures and to educate and support SOAR case managers
- Use work group as a forum for SOAR case managers to discuss what is working and what isn't, to share ideas and share successes
- Communication, communication, communication!!
- You can do this!





Questions and Answers

Facilitated By:

SAMHSA SOAR Technical Assistance Center Policy Research Associates, Inc.

Please type your question into the <u>Q&A panel</u> on the right side of the screen.





For More Information on SOAR

http://soarworks.prainc.com

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soar@prainc.com

