SOCIAL MARKETING FOR SOCIAL INCLUSION

HANDBOOK

A PRACTICAL GUIDE FOR APPLYING SOCIAL MARKETING IN THE DISABILITY SECTOR

Erasmus+

PEDAGOGICAL STRATEGY

SOCIAL MARKETING FOR SOCIAL INCLUSION

CASE STUDIES

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A modern society is not defined by its GDP, the number of kilometers of high-capacity highways, or the percentage of its population with a university degree. A society can only be called modern if it pays adequate attention to those who need special care, that is, to those who are the weakest segment of our world, the disabled. The most affluent societies are those with happy and properly cared for disabled minorities.

Education is probably the best driver of social inclusion of people with disabilities, and this comprehensive handbook focuses on refining the best strategies for their adequate education by reducing absenteeism, promoting active aging, improving therapy programs, and motivating. By bridging the gap between theory and practice through real-world case studies, this book becomes a must-read for everyone working in the disability field, social marketing researchers, and... good citizens.

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This book highlights the valuable tool that social marketing represents in the field of disability inclusion. It promotes respect for diversity, makes visible and normalizes the problems which various social groups suffer in the interests of their social integration.

By means of detailed and exhaustive case studies, this book provides the reader with a broad vision of social marketing for social inclusion, which is a resource that, through the application of different techniques and strategies, contributes widely to defining and addressing the problems faced daily by different social groups. It helps to find the best solution at each time and place. Additionally, it creates new opportunities to achieve full social inclusion of the most disadvantaged people.

The authors present social marketing as a necessary tool and guide for institutions and companies that want to make a difference by including people with disabilities in their teams and training them to respond to the needs of all social groups. For example, by inspiring volunteers and encouraging them to participate in activities aimed at helping others, especially the most vulnerable, social marketing pushes them to get involved and make commitments that no member of society can ignore.

We are all here to make the world a better place. Our commitments improve the world. Each of us has skills that we must put at the service of others. In this sense, social marketing (as a necessary tool for the social inclusion of the most disadvantaged and vulnerable groups) plays a fundamental role in achieving the ultimate goal of the common good, as sufficiently reflected and exposed in the book.

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1. **INTRODUCTION**
ERASMUS+ AND SIM PROJECT

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1.1. Introduction: Erasmus+ and SIM project

Erasmus+ is the EU's programme to support education, training, youth and sport in Europe.

The 2021-2027 programme places a strong focus on social inclusion, the green and digital transitions, and promoting young people's participation in democratic life.

It supports priorities and activities set out in the European Education Area, Digital Education Action Plan and the European Skills Agenda.

The Social Inclusion Marketing (SIM) Project, which is financed by the Erasmus+ Programme, is the outcome of a concerted 3-year effort between partners and specialists who have developed specialized training on social marketing strategies to put into practice in social organizations. In sum, the motto is Social Marketing for Social Inclusion.

It builds on the experience and expertise of four partner organizations – two universities and two nonprofit institutions working with people with disabilities. Their approach is based on practical training and study cases learning, action research and inter-disciplinary thinking.

The project was designed to integrate the theoretical framework of social marketing and social inclusion fields to provide better services and quality of life of people with disabilities and their families. It focuses on looking through the needs of disability professionals when faced with a problem and finding solutions under the social marketing lens.

During this project, we have obtained diverse inter-related outcomes:

- First, the SIM project is the result of extensive primary research led by University of Valencia (UV) that analyzed the training needs[1] in social marketing expressed by disability professionals, and this helped in the definition of the overall objectives of the

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[1] The main conclusions of the analysis needs about the advantages that social marketing disability programs for disability professionals can play in improving the approach to the problems faced by people with disabilities are in:

project: i) improving the social marketing competencies of professionals; ii) adapting social marketing methodologies to improve the quality of life of disabled people ; iii) offering several pedagogical tools to be used by the professionals of social services; and iv) exploring the options to integrate social marketing in the curricula at universities.

- Second, the SIM Handbook[2], led by the Università delle Svizzera italiana in Lugano Switzerland (USI), offers a consistent training methodology with social marketing contents adapted to the social sector. It was developed combining social marketing with social case studies carried on by professionals as action learning. The SIM Handbook contains the contents and the instructions to carry out a course on social marketing and it can be used by trainers to give the lessons and by educators as a self-study book.

- Third, the SIM Pedagogical Strategy, that we present in this document, is an innovative tool aimed at building educators and professionals competencies needed to improve the social inclusion. The bottom-up approach adopted consists of the development of professionals of real study cases systematically evaluated through coaching by the experts of marketing.

- And fourth, the SIM MOOC (massive Open Online Course) integrates all the learning materials available through the University of Valencia platform[3].

We thank our partners for their inspiration and contributions. And, of course, we are grateful to the Portuguese National Agency Erasmus+ for funding this project. The results will certainly be an inspiration to the future strategies and practices for the disability professionals, as we hope they will be to you.

Gil Guzman, J.M., Hernandez-Fernandez, A. and Canales-Ronda, P. (2021), "Bringing social marketing closer to the disability field", *Journal of Social Marketing*, Vol. 11 No. 4, pp. 321-341. *https://doi.org/10.1108/JSOCM-06-2020-0105.*

[2] "A practical guide for applying Social Marketing in the disability sector", Edition SIM Partnership, EQUAL +, 2021.

[3] See www.social-inclusion-marketing.org

2. GENERAL THEORETICAL FRAMEWORK

2.1. Social marketing: Definition

The first concept of social marketing was theorized in the early 1950s by Wiebe (1951), and it referred to the idea that if we are able through traditional marketing to sell goods, we could also be able to sell social goods, like healthy behaviors and socially positive policies. The term "social marketing" first appeared in the academic literature in 1971 in a paper by Kotler and Zaltman who further discussed the utility of using commercial marketing techniques to address social problems, acknowledging the unique differences in aims of marketing a commercial good and a social good (Kotler and Zaltman, 1971). The term social marketing has been often misunderstood and confused with other disciplines and strategies, such as social media marketing, marketing communication, advertising, mass media, or used related to other terms, like social impact marketing (Kassirer et al., 2019). Social marketing is a stand-alone approach that applies theory, research, and practice to bring social change and to solve environmental, health, and social problems as well as policy changes (Kassirer et al., 2019). Throughout the years, many definitions of social marketing were created, and a consensus on a definition was found:

> Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviors that benefit individuals and communities for the greater social good. Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable (Tapp et al., 2013).

A more recent definition was coined by Saunders et al. (2015):

> Social marketing is the application of marketing principles to enable individual and collective ideas and actions in the pursuit of effective, efficient, equitable, fair and sustained social transformation (Saunders et al., 2015).

In this definition, the authors see the role of the traditional marketing expert not as a behavior change agent, but as a facilitator and participant that applies the marketing principles

through genuine participatory engagement, using methods such as participatory action research (Ozanne and Saatcioglu, 2008), and community learning and action (Chambers, 2011). Through these methods, the social marketer seeks to work with the communities in a supportive way, aiming at the free, equitable, fair, and sustainable transformation of society for a greater social good (Saunders et al. 2015).

The scope of social marketing is broad: it can effectively be applied to the behavior of individuals (e.g., motivate and support people to eat a healthy diet and do physical activity); to that of professionals (e.g., help physicians to be more proactive in prevention); organizations as well as policymakers (e.g., pass social inclusion legislation, or restrict advertising aimed at children) (Gordon et al., 2006).

2.2.   Social marketing: Benchmark criteria

In 2002, Alan Andreasen postulated the first set of six benchmark criteria, that from a research perspective, help to distinguish social marketing from other forms of behavior and social change frameworks. This is relevant in order to build a consistent and effective evidence-based framework, and it allows the comparability of studies and interventions. Indeed, in order to be labeled as "social marketing", programs and initiatives must meet these set of criteria (French and Russell-Bennett 2015; Suggs and Speranza, 2022). The benchmark serve as a framework for Social Marketing because they are resourceful instruments for intervention design and evaluation and also, for developing the campaigns and interventions in a powerful and strategic manner, avoiding to simply focus on the "promotion" communication activities (Luca & Suggs, 2010; Suggs and Speranza, 2022).

The six benchmark criteria are: behavior change, audience research, segmentation, exchange, marketing mix, and competition (Andreasen, 2002). Four years later, French and Blair-Stevens (2006) refined and expanded these benchmarks, to include some meaningful changes: audience research criteria were split in two different categories, "insight" and "customer orientation", and "theory" criteria was added as distinct benchmark. Moreover, the new definition of "methods mix" does not include only the 'traditional' marketing mix of 4 P's, but it has been enlarged to include a broader spectrum of methods, techniques, and strategies to behavior change. French and Blair-Stevens (2006) also revised some of the definitions and explanations of each benchmark, as shown in **Table 1.**

Table 1. Comparison among the Social Marketing Benchmark criteria

Social Marketing Benchmark criteria			
Andreasen, 2002		**French and Blair-Stevens, 2006**	
Criterion	*Description*	*Criterion*	*Description*
Behavior change	Behavior change is the benchmark used to design and evaluate interventions	*Behavior*	Has a clear focus on behavior, based on a strong behavioral analysis, with specific behavior goals
Audience Research	Projects consistently use audience research to understand target audiences at the outset of interventions, routinely pretest intervention elements before they are implemented and monitor interventions as they are rolled out	*Insight*	Based on developing a deeper "insight" approach – focusing on what "moves and motivates"
		Customer orientation	Develops a robust understanding of the audience, based on good market and consumer research, combining data from different sources
Segmentation	There is careful segmentation of target audiences to ensure maximum efficiency and effectiveness in the use of scarce resources	*Segmentation*	Uses a developed segmentation approach (not just targeting). Avoiding blanket approaches
Exchange	The central element of any influence strategy is creating attractive and motivational exchanges with target audiences	*Exchange*	Incorporates an "exchange" analysis. Understanding what the person has to give to get the benefits proposed
Marketing mix	The strategy attempts to use all four Ps of the traditional marketing mix. . . . That is, it creates attractive benefit packages (products) while minimizing the costs (price) wherever possible, making the exchange convenient and easy (place) and communicating powerful messages through media relevant to – and preferred by – target audiences (promotion)	*Methods mix*	Identifies an appropriate "mix of methods"

Table 1 *(cont.).* Comparison among the Social Marketing Benchmark criteria

Social Marketing Benchmark criteria *(cont.)*			
Andreasen, 2002		*French and Blair-Stevens, 2006*	
Criterion	*Description*	*Criterion*	*Description*
Competition	Careful attention is paid to the competition faced by the desired behavior	*Competition*	Incorporates a "competition" analysis to understand what competes for the time and attention of the audience
		Theory	Is behavioral theory-based and informed. Drawing from an integrated theory framework

Source: Suggs and Speranza (2022)

2.3. The role of social marketing in the context of organizations active in social inclusion domain

2.3.1. Social marketing history and adaptations

Social marketing is a discipline that addresses social problems. It starts by understanding the root causes, and then it examines the possible causes of factors that lead to social problems. Then, "social policy, strategy, products, services, and/or experiences are developed that will enable or assists publics to derive social benefits individually or collectively." (French and Russell-Bennet 2015). Social marketing offers an established, evidence-based approach for developing, implementing, and evaluating social policies and programs that bring positive change and trust, co-creating opportunities and solutions directly with the target audience, that are the people directly involved in the process of change (Wood & Fowlie, 2013; Upton & Mansell, 2011).

Social marketing was first used to promote contraceptives in developing countries, and to improve child survival rates through oral rehydration, breastfeeding, and childhood immunization in a number of countries around the world. Social marketers continued to experiment and to strengthen social marketing practice throughout the 1980s solving different issues in different domains, especially around family planning and child survival (Chandy et al., 1965), and the containment of the spread of AIDS globally. Subsequently, Australian programs began using social marketing for tobacco cessation and other prevention programs on health topics like skin cancer and breastfeeding. This is the moment in which social marketing theories

started to be consolidated by the first pioneers (Kotler and Roberto, 1989; Manoff, 1985). In the following years, McKenzie-Mohr, (2000) demonstrated social marketing's effectiveness at also tackling environmental problems.

It was evident how social marketing could be a robust approach to tackle social, planetary, and health problems, and how this approach could transversally operate on many social issues bringing positive change and building up innovative and sustainable solutions. Social marketing has now expanded to the most wicked social problems globally, including the sustainable development goals, social inclusion, water and sanitation, vaccination, biodiversity, environmental sustainability, and behaviors related to NCD (non-communicable disease) and NTD (neglected tropical diseases) prevention (Bardus et al., 2019; Aya Pastrana, Miranda, et al., 2017; Aya Pastrana, Somerville, et al., 2017; Firestone et al., 2017;; Kubacki et al., 2017, 2015; Kubacki & Szablewska, 2017; Gordon et al., 2006). It is recommended to be used when addressing a range of social problems in several policy documents, including Europe's Health2020, WHO Global NCD Action Plan (WHO 2013), and the Sage WHO working group on vaccination hesitancy.

Due to its multi- and inter-disciplinarity in solving social problems, social marketing can be adapted to the disability field, addressing the social inclusion of disadvantaged groups. Social exclusion of people with disabilities requires multi-level actions and a marketing lens to understand root causes and solutions, and thus it is a social problem that can be addressed by using social marketing.

2.3.2. Social inclusion

By definition, social problems are:

> Condition[s] or pattern[s] of behavior that (1) contradicts some other conditions or pattern of behavior and is defined as incompatible with the desired quality of life; (2) is caused, facilitated, or prolonged by factors that operate at multiple levels of social life; (3) involves intergroup conflict; and (4) requires social action to be resolved (Lauer, et al. 1998).

Such conditions and behaviors are problematic, harmful, unacceptable, and incompatible with the values of our society and need to be addressed and be changed (Mooney et al, 2014; Rubington & Weinberg, 2010).

Specifically, social inclusion, alongside with social exclusion, as well as social cohesion, are defined below:

Social exclusion generally describes the phenomena where particular people have no recognition by, or voice or stake in, the society in which they live. The causes of social exclusion are multiple and usually appear connected with factors affecting a person's or community's social or economic circumstances where the effect prevents people from participating fully in society.	**Social cohesion** is a term commonly used in social policy, sociology and political science to describe the bonds that bring people together, in the context of cultural diversity.	**Social inclusion** is defined as the process of improving the terms of participation in society, particularly for people who are disadvantaged, through enhancing opportunities, access to resources, voice and respect for rights. (Leaving no one behind: the imperative of inclusive development Report on the World Social Situation 2016, United Nations New York, 2016).

The process of social inclusion foresees steps such as eradication of any forms of segregation, strengthening self-determination, promoting social equity, boosting commitment and solidarity, execution of human and civil rights among which is also the right to work and receive income.

Social marketing for social inclusion of people with disabilities, might improve policies and/or services that improve the experience of people with disabilities and their social inclusion and participation in society. This is done by undertaking evidence about what works and what does not work through the establishment of demonstration projects. Social marketing techniques help to collect the necessary data through the knowledge of the people that are living with the social issue, and the understanding of what they experience, and think would help them or not. Therefore, through a process of co-creation of solutions, social marketing helps to implement interventions and to ensure policy building solutions around people's real needs, making objectives and policy goals realistic and achievable (National Social Marketing Centre).

There is ample evidence that social marketing interventions can work with a range of target groups, in different settings, and can work upstream as well as with individuals. Under this lens, it is reasonable to expect that social marketing can be applied as a systematic approach used in diverse context and for diverse social problems, including tackling the social inclusion of disadvantaged groups and people with disabilities.

3. **PEDAGOGICAL STRATEGY GENERAL CONTEXT**

3.1. Knowing the pedagogical strategy context

The concept of pedagogical strategy, as with the concept of pedagogy, is used by academics, professionals, and non-experts in very different ways and different contexts, giving rise to an amalgam of similar pedagogical elements that are used under the name of "pedagogical strategy" such as: "pedagogical methodologies" (Aglen, 2015; Pagnucci et al, 2015; Alvarez and Vadillo, 2013,) "pedagogical practices" (Pagnucci et al., 2015; Cremin et al., 2006; Leat & Higgins, 2002), "pedagogical techniques" (Laditka & Houck, 2006) or "teaching methods" (Pagnucci et al., 2015).

> The concept of *pedagogical strategy* is not easy to define because it is used in very different ways and in different contexts.

There is not a consensus definition of pedagogical strategy in the literature, however, several have been found, for example: the pedagogical strategy could be understood as "the support that allows changing the patterns of interaction in the classroom, so that the learning process is accelerated" (Adey & Shayer, 1994), presenting itself as a useful tool both for the teachers to improve their skills and for the students to learn more attractively and efficiently. Lewis & Dehler (2000) used paradox as an example of pedagogical strategy and suggest that this concept could be assimilated to "the lenses through which we learn". Finally, Leat & Higgins (2002) stated that a pedagogical strategy should be a tool that allows teachers to experiment with the parameters of the learning environment", providing a series of attributes that a powerful pedagogical strategy should possess.

The same challenge has been found with regard to how the concept of "pedagogical strategy" is implemented in the educational act. The literature review has found that some strategies refer to educational elements with a high degree of complexity such as: "online training", "training through paradox" or "case studies"; but others, applied in the context of school education, consider it as much simpler educational activities such as: "games", "storytelling" or "taboo" (Leat & Higgins, 2002). Examples of pedagogical strategies in contexts similar to social marketing and disability can be seen in **Table 2.**

Regardless of the specific definition, or the specific approach used, a pedagogical strategy should include at least the following general aspects (Sexton & Garner, 2020; Aglen, 2015; Pagnucci et al., 2015; Gikandi et al., 2011; Cremin et al., 2006; Laditka & Houck, 2006; Leat & Higgins, 2002):

- **Context of the training provided**. This relates to the level of training that is implemented, the resources available (physical, technological, etc.) and the capacity

Table 2. Some pedagogical strategies

Pedagogical strategies	Context	Authors
Service-learning	Postgraduate course in marketing and corporate marketing and communication.	Alvarez & Vadillo, 2013
Flipped Classroom as active methodology through games	University study nutrition.	Gilboy et al., 2014
Development of a case study by the students themselves.	University study of business management.	Laditka & Houck, 2006
Learning through the strategy of paradox.	Organizational learning.	Lewis & Dehler, 2000
Lesson, tutorial approach, modelling, fieldwork, problem-solving, problem-based learning, discussion, simulation, role-playing, cooperative learning, projects, brainstorming, self-regulated learning	School of Nursing.	Pagnucci et al., 2015
Group discussion, case studies, guest lecturer, role-playing and video.	Teaching ethics in university study of management.	Sexton & Garner, 2020
Lecture, applied lessons, theory lessons, lectures with experts, homework, thinking for oneself, tests, quizzes, problem tests, skills instruction, knowledge instruction, recommended readings, term papers, cooperative learning, group projects, seminars.	University study of business management and marketing.	Ulrich, 2005
Online training.	Higher education.	Gikandi et al., 2011

Source: Own elaboration.

and opportunity for the learner to develop their different skills. The context in which the strategy is developed refers to three aspects: a) the equipment (computer equipment, teaching materials…), facilities (type of classrooms, desks…) and number of students; b) the institutional and regulatory framework in which the curriculum is developed (nursing school, postgraduate marketing course, adult education…); and c) the pedagogical framework that supports the strategy (constructivism, emotional learning, active learning…).

▪ **Elements that are part of the strategy**. These are formalized procedures regarding the activities to be carried out, the skills to be implemented, the time planning or the necessary routines. A broad spectrum of elements that could form part of the design of a strategy exist. Some examples are: the transversal skills that the strategy promotes and the use of it to allow students to learn; time planning of activities; establishment of routines, generation of a didactic structure that supports it and instructions so that the teacher can develop each of the classes; and the inclusion of ethical aspects (Sexton & Garner, 2020).

▪ **Desirable characteristics for successful implementation**. They relate to the flexibility of implementation, variety of possible solutions and promoting a positive and enriching education and training context. Leat & Higgins (2002) reviewed the main characteristics that a pedagogical strategy should possess to enable professional and curriculum development. Namely, it should represent a single unit of change; it should be flexible; tasks should not have a single correct solution; it should be a framework for the reconfiguration of the role of subjective knowledge; it should promote spoken debate; it should promote an enriching educational context, and it should be a framework for the reconfiguration of the role of subjective knowledge.

▪ **Design of evaluation and monitoring mechanisms**. It is necessary to implement tools to measure the results of the implementation of the strategies. These measures can affect both the training process and its outcome. It is even possible to design activities that are an evaluation themselves. In relation to the strategy evaluation, some authors suggest the need for both formative (process) and summative evaluation (final evaluation or evaluation of the learning obtained). The inclusion of some evaluative activities could also be considered, such as peer-evaluation (Leat & Higgins, 2002); self-evaluation (Laditka & Houck, 2006); online evaluation (Gikandi et al., 2011); and evaluation through observation (Cremin et al., 2006).

▪ **Analysis of the teacher's role in the training process**. This will depend mainly on the level of training of the students, the complexity of the problem or the proximity to the work context. On the role of the teacher within the pedagogical strategy, some authors present some suggestions that could be considered for the design of the strategy pursued in this Handbook. For example, Cremin et al. (2006) suggested the importance of the teacher in: a) maintaining a withdrawn position of observation and listening, looking for learning opportunities; b) creating an educational context with multiple learning opportunities; c) providing students with numerous resources so that they can freely choose which ones to use; and d) allowing students to manage their own learning time.

3.2. Main pedagogical strategies

The different practical applications or taxonomies of pedagogical strategies (Pagnucci et al., 2015) can be classified into two main groups: teacher-focused, the "teacher development model" (Leat & Higgins, 2002), and learner-focused strategies, the "pedagogy and positive thinking model" (Cremin et al., 2006).

The first group refers to those strategies based on the teacher and their interaction with the learners (Leat & Higgins, 2002). To be effective, it is necessary that the teacher shows good knowledge of the content being taught, as well as adequate preparation for the development of the necessary practical activities. These strategies are characterized by a strong control by the teacher of both the content and the students' feedback, as well as a necessary prior structuring of the content to be taught. A classic example of this type of strategy are the Master level classes. The teacher development model (Leat & Higgins, 2002) bases the effective pedagogy on the interaction between: a) pedagogical knowledge of the content to be taught; b) teacher beliefs; c) classroom practices; and d) student response.

The second group of strategies are learner-focused, making the learner an active participant in his/her own training. In this framework, the learner also assumes responsibility for the development of the training actions and there is a greater interaction between the learners themselves, and between the learners and the teacher. The positive pedagogy and thinking model (Cremin et al., 2006) is composed of the following elements: a) learners; b) teacher; c) an enabling context; and d) three key pedagogical strategies. The first is called "standing back" and refers to how the teacher positions, observes and listens to the learner, being aware of the nature of the learner's participation in the learning process, making the teacher an agent of possibilities. The second is called "profiling learning agency" and describes a facilitative pedagogical framework in which learners are provided with multiple opportunities to initiate their own activities and make their own choices, and the third strategy, "creating time and space", involves the development of a shared and flexible agenda in which learners choose the activity and timeframe they wish to work on.

In the **learner-focused group**, we can find a great diversity of strategies, for example:

- **Collaborative work** (Johnson et al, 1994). Students, in small groups, must work together, so that the efforts of each group member have an impact on the others. Each student is responsible for their part of the work and for collaborating with the others. The teacher must prepare the necessary materials, organize the groups, encourage interaction and establish the criteria for group and individual assessment.

- **Problem-based learning** (Malmia et al., 2019). The starting point of learning is a problem to be solved in a group by students. It is suitable for developing students' decision-making skills. The teacher should prepare the case appropriate to the contents of the training and evaluate the progress of the students.

- **Inquiry-based learning** (Lambert, 2009). This strategy is based on getting students to learn the processes of research through their active participation in the development of the resolution of a problem. The teacher must involve the students and arouse their curiosity about the topic or problem to be worked on. Students must, from theory, choose alternative solutions to the problem and reflect on them.

- **Project-based learning** (Scarbrough et al., 2004). Students are presented with a situation or problem to which they must find a solution through interaction in small groups. It is an approach like a real environment, in which students learn, design actions and may even have to implement them. The teacher must define the problem, monitor the evolution of the proposed solution, and grade the result.

- **Service learning** (Daynes & Longo, 2004). This strategy combines the learning of content with the performance of a useful activity in the students' environment, in such a way that a real need is covered or solved. The learner is involved with their environment and transfers their knowledge and skills as if he or she were a professional. The teacher must generate contact with the environment, design the transfer process and supervise the process.

- **Case study learning** (Yin, 2014). The case study is the methodology based on solving business management and marketing problems. Traditional examples of case studies used in marketing are: L'Oreal; GoPro ; Pet Sitters; Intel; Red Bull.

This is the methodology chosen to apply to this book. The choice is based on the research carried out by Gil, Hernandez and Canales (2021) according to which disability professionals clearly stated that training actions in marketing should be aimed primarily at front-line professionals such as caregivers, occupational therapists, psychologists, social workers. Marketing teaching materials and training courses should be developed specifically for these professionals and based on their real daily problems working with people with disabilities (case study methodology). In relation to this, it should be noted that 49.3% of respondents to the quantitative questionnaire stated "case study" as the preferred pedagogical methodology. This pedagogical preference was also subsequently confirmed in the qualitative interviews.

3.3. Case study learning methodology

The objective of this pedagogical strategy handbook is to adapt this methodology to the analysis and resolution of problems related to social inclusion from a marketing perspective. The case study methodology is one of the most commonly used methods in training in different related areas of knowledge, such as health, humanities, and social sciences. In this sense, Gilboy et al., (2014) offer us a working template for the teacher that can be useful for the development of the lessons of the pedagogical strategy that is planned to be designed (See ANNEX II).

3.3.1. What is the case study methodology?

The use of the case studies was developed by members of the Harvard Graduate School of Business Administration in the 1920s. Case studies have been widely accepted as an effective way of exposing students to the decision-making process.

In the social sciences, the concept of the case study refers to a method of analysis and research to examine a problem, that can be used as an alternative solution for wider environments than the one analyzed (Yin, 2014). Cases studies serve to close the gap between classroom learning and the so-called real world. They provide us with an opportunity to develop, sharpen, and test our analytical skills at assessing situations, asking the right questions, identifying and evaluating alternative courses of action, making decisions under conditions of uncertainty, evaluating the results of past strategies, etc. (Stake, 2000).

> In the social sciences, the concept of case study refers to a method of analysis and research to examine a problem, that can be used as a solution alternative for wider environments than the one analyzed (Yin, 2014).

Basically, cases studies represent detailed descriptions or reports of situations or problems to be resolved. They are usually prepared by an observer who had been involved in the situation and had some relationship with the problems under consideration (Transnational Partnerships SIM, 2021; Yin, 2014; MacNealy, 1997). The cases generally entail both quantitative and qualitative data which must be analyzed to determine alternatives and solutions.

The primary purpose of this method is to introduce a measure of realism into management education. Rather than emphasizing the teaching, the case method focuses on the application of concepts and sound logic to real problems.

3.3.2. Case studies process

The process implicited in this methodology consists of basic four steps (Rasche & Seisreiner, 2018), as **Figure 1** shows.

Figure 1. The case study process
Source: Rasche & Seisreiner (2018).

1. **Problem definition.** This is the central component of any case study. In the analysis of the problem, the professional should analyze the data carefully to extract the relevant information and delete the superfluous one to get a clearer picture of the situation. The first phase is to consider the environment in which the problem occurs, and the analysis of the industry in which the organization does their work (Transnational Partnership SIM, 2021). But also, it is necessary to carry out an internal analysis of the organization. Key areas such as objectives, constraints, management philosophy, strengths, weaknesses, and structure of the firm are very important. At this point, the difference between facts (objective information) and opinions (subjective interpretations) should be noted. It is fundamental to correctly state and understand the problem in order to proceed with the following steps.

2. **Alternatives courses of action are formulated.** Recognizing problems and their basic elements are critical for a meaningful case study. After careful analysis, problems and their principal questions should be stated and listed in order of importance. But finding real problems and their basic elements can be difficult. What issues are there that suggest these are the real problems? What is the primary problem in this situation? Where are the secondary problems? How much of this problem is based on facts, and how much on opinions? How are the problems related; are they independent or are they the result of another problem? How will the situation evolve in the long run?

3. **The alternatives are analyzed in terms of their positive and negative aspects.** In this phase, you must start looking for a solution to the problem outlined above. Many times, there are several alternatives that allow solving the same situation or problem. To find different solution alternatives, you can use the experience of the

professionals involved or conduct research to discover how a similar problem was solved in the past. To select the ideal solution, once a range of possible solutions have been found, it is crucial to analyze the alternatives based on their costs and benefits. The costs, not only of economic type, are the different actions that the organization must carry out, and the necessary resources (money, time, people, etc.), to be able to put into practice the solution finally chosen. The benefits are any positive returns that those involved in the problem will receive at the end of the process (personal satisfaction, good image, economic benefits, etc.).

4. **The best solution is chosen, and those actions considered most appropriated are recommended.** Based on the results of the previous analysis, the chosen solution is the one that best resolves the critical situation and that minimizes the appearance of new problems. It is important to explain why this solution was chosen and, also, why the other solution alternatives were discarded. To complete this last phase, future actions must be guided and put into operation at the right time (Transnational Partnerships SIM, 2021). What should be done to launch the chosen solution? Who should be involved, and what responsibilities should each person assume? When and where will the proposed actions take place? On what basis will the success or failure of the action taken to be measured?

3.3.3. How to write a case study?

A case study involves analysing a question or problem in-depth, interpreting and disclosing the available information, which culminates in recommendations for the resolution or improvement of the starting situation. Choosing a case to investigate does not just choose a problem to solve. Various factors can condition the choice of a case being studied. Some practical conditions such as the time or information available can determine the choice of the case to study (Seawright & Gerring, 2008). Some of the factors to consider are presented in **Table 3**.

Table 3. Factors to consider when writing a case study

Factor	*Description*
The novelty	The degree of novelty or how unusual the problem is will determine the necessary level of analysis. A new problem can be analyzed from a new perspective.
A new way to deal with a problem	The repeated use of the same technique of analysing a problem may mean not advancing in new points of view that provide new solutions. The analysis of a case study often implies a new way of dealing with the resolution of a problem, providing some practical alternatives not previously assessed.

Table 3 *(cont.).* **Factors to consider when writing a case study**

Factor	*Description*
The usefulness of the results	Another aspect to be considered before choosing a case study is to assess the usefulness of the results of the investigation of a specific case in the application to solve broader and more general issues or problems.
The possibility to anticipate the results o to provide a clear vision to face the resolution	A case study is an exploratory research methodology that highlights the need for deeper analysis before addressing the resolution of the problem. The use of the case method is useful when few previous analyzes allow to anticipate a result or provide a clear vision to face the resolution of the problem.

Source: Seawright & Gerring (2008).

3.3.4. Contents and structure of a case study

The content and structure of a work based on the case study is like that of a university research work. Although the structure is not strictly defined and you can find diverse contents and structures, the literature proposes the following basic elements for writing a case study (Miller, 2018; Swanborn, 2010; Gerring, 2007):

1. **Introduction.** The introduction helps determine the different objectives of the study from the beginning. In addition to describing the investigation problem and its importance, you must also report on the reason for using the case and its relationship with the problem to be investigated. For this reason, the introduction should answer questions such as what is being studied? What is the most important problem or issue to be analyzed? What is known about the subject analyzed so far? What is expected with the resolution of the case study?

2. **Literature review.** The objective is to obtain an adequate vision of the background of the problem to be analyzed and its relation to the current situation. We will have to consider aspects such as relevant literature to understand the problem, identifying new ways to understand prior research, trying to decide between different and opposite alternatives that were raised as previously valid, discovering the need for new information to facilitate the objectives of the analysis, showing the usefulness of the new study and its relationship with previous research, etc.

3. **Selected a case study.** Why did you select a particular case study? Now you must explain why and how a particular case was selected and why you decided that the case was appropriate to address the research problem. Depending on the type of subject analyzed in the case study, the type of information needed to justify sub-election will vary:

i. If a case study is a **person**, it will be necessary to explain why this person was selected and what personal situations he/she has lived in relation to the problem investigated and what are the differences with other possible candidates. It will also be important to indicate the relationships that this person has had with other people and organizations to value its appropriateness for a case study.

ii. If the subject analyzed in the case study is an **event** that can be attended by the people involved in the subject to be analyzed, the place and time in which said the event will take place must be clearly described.

iii. If the subject analyzed in the case study is a **place**, it will be necessary to explain what makes the event unique or special so that its study is justifiable. Not only the important attributes of the event must be explained, it is also necessary to justify why that event will bring new knowledge to the problem analyzed.

iv. If the subject analyzed in the case study is a **fact or occurrence**, the justification of its use within the case study will focus on the interaction of the people involved in it within a complex physical, social, economic, cultural or political system.

4. **Discussion and Conclusions.** In the discussion section, you should briefly include the research problem you are investigating and explain why it was used, including an adequate explanation of the meaning of the findings and why they are considered important, you must relate the results obtained with those of studies above and include explanations of the results during the case analysis. All papers on a case study should include a section of conclusions, in clear and simple language. You must show that the results of the case study confirm or contradict the results of previous research and what is the reason and its effects. We must present the most important results to show how they allow us to analyze the problem. To conclude, it is necessary to include the limitations of the case study and future lines or research needs.

Considering the aim, target and scope of this book, the structure of the case studies is the one that **Figure 2** shows. It must be noticed that section 3.2 proposes diverse problems and solutions that can be analyzed and developed for each learner individually or collectively. In Section 4, we present four case studies where the actions are more developed. The main conclusions reached are set out in section 5.
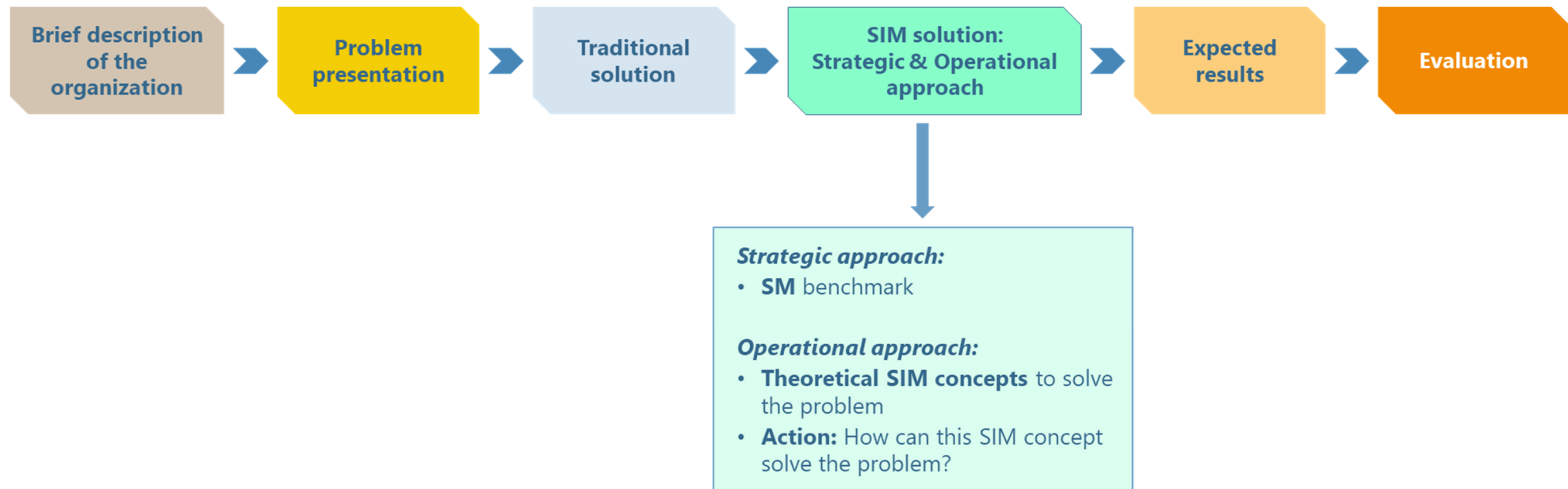
Figure 2. Proposed structure for the case studies

Source: Own elaboration.

4. **SIM PEDAGOGICAL STRATEGY**

4

4.1. Bringing disability field needs to social marketing pedagogical strategy

SIM project stems from the partners´ belief that the social marketing concept, techniques and strategies are virtually unknown in the disability field. Moreover, partners also noted that social marketing might have the potential to be better implemented in the disability field, improving its capacity to tackle specific challenges.

As a result of this strong belief, partners decided to carry out a theoretical analysis where several social marketing and disability papers were reviewed, getting a better insight into the most important features of the two fields studied—social marketing and disability. (Transnational Partnerships SIM, 2021).

But, it was still needed to collect more information in order to ensure that the forward-looking results would produce educative outputs addressing the real needs of disability educators. Then, at the beginning of 2019, partners carried out a training needs assessment that would be later the first intellectual output published by SIM project (Gil, Hernández and Canales, 2021).

This training needs assessment employed a mixed method approach combining qualitative and quantitative strategies. It was formed by 3 phases:

1. Pre-test phase: The research completed 20 unstructured interviews and 1 online group interview.
2. Quantitative cross-cultural research: 137 web-based self-administered questionnaires were completed in 6 European countries.
3. Quantitative results validation: 8 unstructured interviews were completed to validate the quantitative results.

According to the results of this research, the following sections, focused on the use of the case study as a pedagogical methodology, have been designed as a result of these preferences stated by educators when they were asked about the most appealing pedagogical methodology to take part in social marketing learning activities.

4.2. Marketing techniques used to tackle the problem and solution proposed

The marketing discipline tries to favour beneficial exchanges between supplying companies/organizations and different demanding targets, seeking the mutual benefit of both parties, and sometimes even promoting the benefit of third parties.

When marketing is applied to the social sphere, commonly referred to as **social marketing**, the supply and demand exchanges are not driven by economic profit. That is, it is not about selling something to someone who needs it. In the social sphere, the aim of marketing is to promote changes in the target group(s) (increase awareness of a certain theme, improve attitudes towards something or someone, increase motivation, encourage greater involvement, etc.).
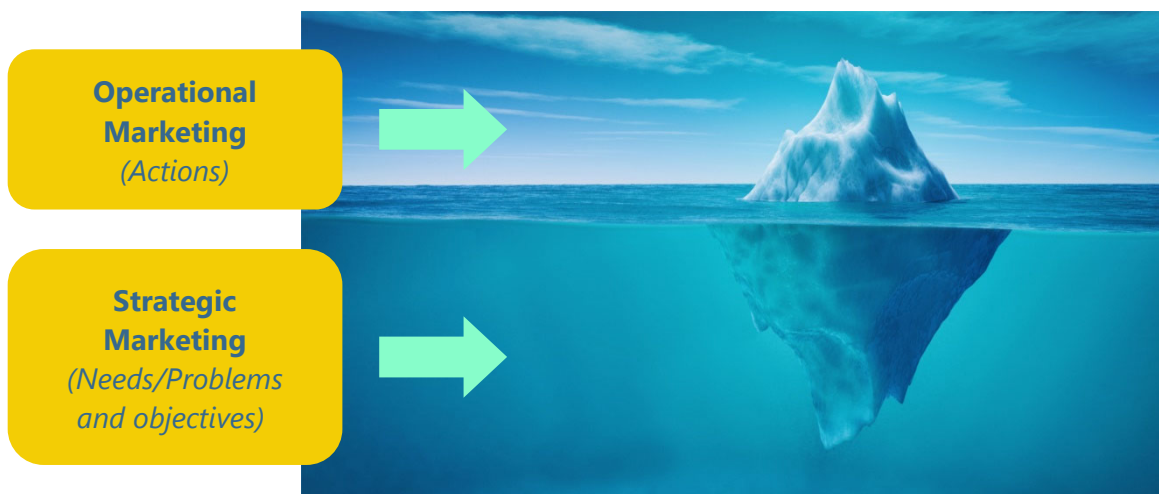
Figure 3. Strategical Marketing (needs and objectives) and Operational Marketing (actions)

Marketing can be broken down into two main areas that are closely related (**Figure 3**). Both of them should be applied by companies sequentially: strategic marketing and operational marketing.

- First, and in broad terms**, STRATEGIC MARKETING** allows an organization to understand who its target audience is and what this target needs (which is its problem). To this end, an organization must analyze the opportunities and threats of the

external environment in which it operates and to identify its weaknesses and strengths in order to serve this audience in the best way to solve its problem/need. So, the strategic marketing requires a long-term approach, its unseen, needs thinking and its main objective is to identify those needs/problems that need to be solved to improve the performance of the organization. All the organizations need to follow a strategic orientation.

So, one of the most important marketing topics from a strategical approach in the social field **is to understand the different targets** involved with the organization (clients, workers, parents, volunteers etc.). To this end, two basic steps should be followed: segmentation of the public (external and/or internal) and identification of the segment that will be chosen. The chosen segment is named in the marketing discipline "the target", and the main objective of the organization is to solve its need/s-problem/s.

In this book, the role of strategic marketing has been included as the **first topic** of the proposed pedagogical guide named Segmenting-Targeting. This should be the starting point before working into the operational marketing:

— *Topic 1:* in terms of **Segmentation-Targeting**, an organization starts identify some needs/problems. To this end, organizations need to segment public/s (external and/or internal), identify potential targets among the segments that require action and propose ways to create value. Therefore, the study of segmentation and targeting is key to being able to identify unmet needs and to satisfy them by modifying perceptions and/or attitudes and/or behavior.

- Second, and closely related to strategical marketing, **OPERATIONAL MARKETING** is concerned with how best to address the needs (problems) of the target audience(s). This part involves assigning specific tasks to specific people and establishing a timetable and a budget for implementing the proposed actions. This tasks are linked to different "marketing tools". Operational marketing follows a short term approach, its visible, requires action and helps to specify who will do the tasks, when and with how much budget.

In this book, we have focused on **five groups of marketing tools** that are widely used by social marketing companies. That is, the following four topics are really useful and applicable in the social sphere to solve the identified problems and to meet the needs of the target audience/s: communication, internal marketing, product innovation and measurement of results. In this book, these four operational marketing tools constitute the next four topics of the pedagogical guide.

— *Topic 2:* as far as **communication** is concerned, marketing provides different tools with which to inform and/or persuade and/or raise awareness among various stakeholders in order to get them to act in accordance with the organization's objectives. New technologies have expanded the range of tools capable of impacting on the minds of individuals at a lower cost and with great effectiveness.

— *Topic 3:* in terms of **internal marketing**, there are also a multitude of tools used to train, motivate, stimulate and reward internal staff. In other words, an organization that functions well is thanks to its employees (managers, workers, volunteers, etc.) and internal marketing is able to contribute to this. Therefore, marketing tools are not only applied to the demanders (customers), but also to the providers themselves (staff of the organization).

— *Topic 4:* in terms of **product innovation and brand**, social organizations also need to have a strong corporate image that reinforces their credibility and reputation among different stakeholders. Operational marketing provides various tools for this purpose, as well as for ensuring that the tangible products or services offered by the organization are perceived as cutting-edge, useful and necessary in order to be consumed.

— *Topic 5:* regarding **results measurement,** operational marketing provides various indicators to be able to monitor the correct performance of the organization's activity and, if necessary, to introduce the appropriate corrective measures. This requires, as will be shown later on, the setting of realistic, achievable and measurable objectives in the strategical phase.

To better understand these five major marketing topics included in our pedagogical guide, ten cases/problems of social inclusion companies have been proposed in order to illustrate how they can be solved from a practical point of view. So, the cases are based on real companies active in the field of social inclusion with real problems. The names of these companies have been omitted in order to allow the proposals to be generalised to companies with similar problems. The two organizations involved are APPC from Portugal and NARHU from Bulgaria. The authors are extremely grateful for their collaboration.

Table 4 shows ten current problems in the sphere of social inclusion and the recommended marketing strategy used to solve them. Although each case has been assigned to a particular marketing topic in the program that will be developed in epigraph 5.5, more than one marketing topic can be used for each problem. As the table shows, for all the cases, the problematic target/s was/were identified in a previous strategical phase (segmentation and targeting), and for each of them diverse operational marketing tools have been proposed for solution.

Table 4. **Marketing tools applications to solve real problems in the social marketing sphere**

	Segment-Targeting	Communi-cation	Internal Marketing	Product and Brand	Results Measurement
❖ Avoiding trainees' high absenteeism	√		√		
❖ Promoting active aging	√	√			
❖ Attracting successful entrepreneurs/trainees to be enrolled in training programs	√		√		
❖ Improving sales of hand-made Easter decorations produced within the occupational therapy program	√	√		√	
❖ Motivating people with physical disabilities to engage in physical exercise and enjoy its benefits	√	√			
Good practices: **4 extended cases**					
❖ Reducing caregivers' absenteeism	√		√		
❖ Improving children and young people with disabilities playing sports	√	√			
❖ Finding & motivating young volunteers to participate in inclusive leisure activities organised on regular basis	√	√	√		
❖ Encouraging informal caregivers, who provide palliative care services to their relatives in the home environment, to acquire professional qualification	√		√		
Innovative practice: **1 case about measurement and impacts**					
❖ Designing indicators for disability organizations to improve the way in which social interventions impact is measured	√				√

REDUCING HIGH ABSENTEEISM OF TRAINEES

4.2.1. Reducing high absenteeism of trainees

a. Problem presentation

This organization promotes the social inclusion of people, with special attention to people with disabilities and/or handicaps. Vocational Training is one of the services it offers, financed by the EU. The main objective of the Vocational Training is the development of a training activity aimed at promoting employability and the acquisition of knowledge and socio-professional skills, which facilitate the progressive professional and social inclusion of people with disabilities and incapacity (PCDI).

Trainees' absences and dropouts make impossible the realization of the personal and professional life project with serious consequences for their social and professional integration.

b. Traditional solution

From the admission of trainees, the organization applies the following measures:

— Explaining the compulsory rules and expected behaviors of the trainees.

— Promoting a positive institutional climate for trainees with behavioral problems.

— Intensification of family or interinstitutional articulation.

— Reducing monitoring intervals.

— Increasing frequency of technical support to users with mental health problems.

— Differentiating training strategies according to the needs of trainees.

c. <u>**Theoretical SIM concept that can be used to solve the problem**</u>

The target group consists of young people with severe behavioral problems and who have experienced continuous underachievement at school, which has undermined their confidence in their own abilities and their interest in education and training. These young people often need to reinforce their self-confidence and rediscover an interest in learning before making a commitment to education and training (Cedefop, 2021).

In order to decide which strategy is best to solve this problem, the real needs of the target audience should be known: people with disabilities who do not attend vocational training, maintaining a high degree of absenteeism. So, the organization should carry out: individual interviews; a survey focused on what each disabled person would like to do; focus groups. Internal and external barriers are detected, such as for instance: lack of self-esteem; lack of interest; family problems; drugs problems. Several marketing techniques are proposed:

1.   **Reinforced motivation strategy**

Motivational activities aim to strengthen self-esteem and self-confidence and contribute to the development of social skills (West and Michie, 2020). These activities aim to:

- Stimulate kindness: encourage young people's curiosity and foster a positive attitude towards learning.

- Promote discipline: reduce aggressiveness, helping deal with conflict and also reinforce resilience or the ability to cope with difficulties or challenges.

- Create a welcoming and inclusive learning environment.

- Listen to the student 'voice'.

2.   **Image enhancement campaign**

Vocational education and training (VET) has a poor reputation. Its image needs to be enhanced not only in the eyes of young people, but also in the eyes of their families and other key stakeholders such as teachers, career counsellors and employers. The image of VET can be improved through information, promotional activities and social media.

3.   **Mentoring program**

Mentoring consists of individualized support to young people on an ongoing basis by an entrepreneur or group of companies that shows the possibilities offered by training to then be able to enter the labour market. It is an active mentoring since the student or group of students visits the companies and interacts with them. Young people can benefit from the advice and support of an adult who is "external" to their apprenticeship.

d. <u>Marketing action/s to solve the problem</u>

The challenge is to avoid or at least to reduce trainees' absenteeism. As the personal problems faced by the trainees are diverse in nature, before starting to apply any technique, the organization should apply segmentation and targeting tools.

Action 1: *Reinforcing motivation to learn*

- Offering sports and/or cultural activities to help create a positive climate.
- Creating common spaces to promote diversity.
- Reward system: celebrating learner achievement.
- Promoting the use of shared facilities and spaces to build relationships between teachers, trainers, learners and parents.

Action 2: *Improving VET image*

- Redefining VET curricula and offering valuable qualifications, using modern technologies and innovative learning methods and environments.
- Adapting VET programs to the skills required in the labour market.
- Organizing promotional activities.
- Image enhancement communication using influencers and social media.

Action 3: *Mentoring by companies*

- Establishing links with local companies and other local stakeholders.
- Career talks and site visits.
- Work experience, focus session.
- Provide up to date information about careers in their sectors.

PROMOTING ACTIVE AGING

4.2.2. Promoting active aging

a. Problem presentation

A national association of professionals working with people with disabilities has decided to promote active aging among elderly people, especially to those aging with disability is important task. This association has been operating for more than 20 years both on national and European level.

Unfortunately, many of their clients are still living with the perception that as they get older, they become frail, vulnerable, and not so efficient anymore. Therefore, they are failing to adopt active lifestyle habits. The European Commission (EC) formulated the parameters of "active life for the elderly" for the first time in 1999: according to the EC, the concept means helping people stay in charge of their own lives for as long as possible as they age. This means adopting a healthy lifestyle, longer participation in the labour market, later retirement and maintaining activity after retirement. In this way, promoting the active life of older people means providing opportunities for a better life, not restricting the rights to individual realization and life choices.

In sum, this association desires to promote active ageing among elderly people (+65 years old).

b. Traditional solution

Elderly people are invited to attend seminars and roundtables where the topic is presented and discussed in detail. Guest speakers are also invited to share their experience within these events. In this way the seminars are both educative and socialising events.

c. Theoretical SIM concept that can be used to solve the problem

Considering the application of the quality of life model to this problem, the association can use diverse marketing tools to reach its objective through this project: how to promote active ageing. In this sense, a 360º communication strategy defining objectives, target, creativity strategy, media, timing, and budget is proposed. This communication strategy could include the creation of a guide of healthy practices for elderly people.

To this end, first, it is necessary to define the target of this strategy. Therefore, **Table 5** shows the main profile of our target.

Table 5. Target profile

Age	65+
Gender	Male, Female
Motivations to practice active aging	Feeling psychically and physically well
What they want to receive	Life satisfaction of being at 65+ and still finding a purpose of being active in life
Time availability	8am-11am
Other aspects	There is not an age restriction for being a student. Some of them participate in community groups like the best homemade food; gardening; walking the children to school and back home etc. Some people experience a very rich social participation. There are memberships available in spot clubs, yoga centres, dancing classes. Special spa packages for elderly are offered also in many hotels around the country. Travel agencies also have special offers. Leisure activities are organized in so called pensioner's clubs (knitting, chess playing, singing, organized excursions, visiting different fests). Religious centres welcome people according to their believes. Volunteer organizations accept people at different ages.

Once analyzed the target audience's profile, it is important to set specific objectives, smart objectives, to reach with this project. In this sense, the following is proposed:

1. **Quantitative objectives:**

   a. To get at least 10 people of all quarters of the interested town to change their behavior in some way. In total, approximately 60.

2. **Qualitative objectives:**

   b. To improve the notoriety of the active ageing programme.

   c. To increase the motivation of participate in the active ageing programme.

d. Marketing action/s to solve the problem

As state before, a 360º communication strategy is proposed to try to solve the problem. This strategy can be accompanied by various actions:

- **Action 1:** To develop a logo and slogan for the campaign/programme. It is really important to create a slogan that motivates elderly people to participate and avoid their barriers (lack of time, fear of new endeavours, etc.)

- **Action 2:** To communicate this active aging programme among elderly people through the organization's facilities and medical centres.

- **Action 3:** To communicate this programme using mass media (for example, radio or newspapers). It is important to know which mass media and vehicles this target uses.

- **Action 4:** To organize a sport open day. The idea is to invite elderly to a free of charge sport activities where they will be able to see what exactly they could do if they decide to practise yoga or gymnastics, for instance.

ATTRACTING SUCCESSFUL ENTREPRENEURS/TRAINEERS

4.2.3. Attracting successful entrepreneurs/traineers to enrol in training programs

a. Problem presentation

A non-profit association, which acts as a national representative body of different types of professionals who are working with people with disabilities in the domains of education, employment and social inclusion, desires to attract successful entrepreneur/trainers to be enrolled in its programmes.

The Vocational Education Training (VET) department is the biggest one within the association. The territorial scope of the activities exceeds the region where the association is located as large share of the trainings are provided based on blended learning approach, which allows combination of face-to-face and e-learning.

Up to now more than 2000 people with different types of disabilities and more than 2500 professionals working with them have completed the VET training courses to upgrade and improve their qualification. The trainings are provided using conventional methods of teaching as well as through open distance learning platforms and mobile applications. The thematic scope ranges from specialized courses for psychologists and social workers, training of supported employment consultants, accessible interaction with people with disabilities, inclusive education and use of artificial intelligence, till VET courses for people with disabilities on: managing accounting, information and assistive technologies, social entrepreneurship and others.

The sub-department Social Entrepreneurship works in close cooperation with experienced entrepreneurs to support the needs and to advise the clients/trainees (social entrepreneurs). The common challenge is to attract the successful trainers and engage them in the counselling

process. The issue is how to cooperate with popular and successful enterprises and their owners and managers, so they can act as "champions" or "role models" to the social entrepreneurs who have just started their own business.

b. Traditional solution

The interactions between the experienced entrepreneur and starting social entrepreneurs occur in person, by phone, or online. The key requirements for success of communication are trust and self-determination. In order to continue with this successful initiative of exchange of good practices and lessons learned, they need to attract and involve many experts in their program. Usually, they use their personal contacts and networks to promote/disseminate their initiatives and to involve newcomers into the program. Recently, due to the pandemic situation and due to the limited numbers of successful entrepreneurs in the region, they are facing the following dilemma: "How to attract the entrepreneurs to be enrolled in our program?"

c. Theoretical SIM concept that can be used to solve the problem

Based on the Exchange Theory, this association can use diverse marketing tools to reach its objective through this project. In this sense, the following strategies are proposed:

1. **A 365º communication strategy** defining objectives, target, creativity strategy, media, timing, budget. Importance of public relations (with enterprises, mass media and other social agents). An event marketing strategy can help to win notoriety in the country. Possibility of online advertising.

2. **Internal marketing strategy** in an attempt to recruit and motivate internal staff, in this case, trainers.

d. Marketing action/s to solve the problem

As indicated above, there are two main strategies that give rise to a number of actions as, for example:

- **Action 1:** To update the association's website, with a space dedicated to this target group

- **Action 2:** To organize an event to highlight the role of entrepreneurs/trainers in the programme and to win notoriety in the country.

- **Action 3:** To design a communication campaign in social media to create more notoriety among the entrepreneurs/trainers.

- **Action 4:** To create or integrate in an entrepreneurship platform, analysing the possibility of joining other associations/institutions.

- **Action 5:** To identify 'ambassadors' among entrepreneurs.

- **Action 6:** To create a guide for entrepreneurs.

- **Action 7:** To create and always keep an up-to-date entrepreneurs/trainer's database.
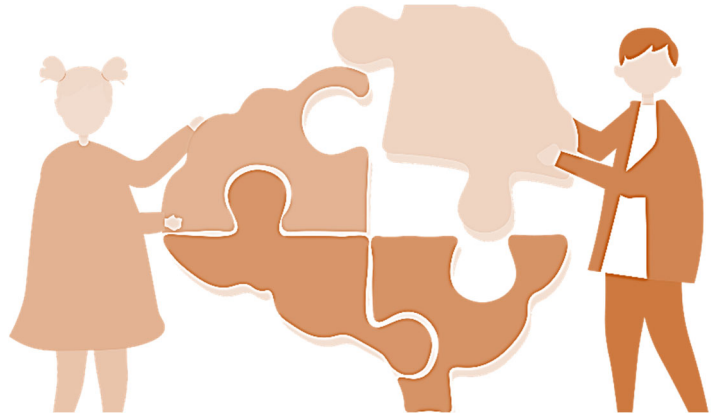
IMPROVING OCCUPATIONAL THERAPY ACTIVITIES

4.2.4. Improving sales of hand-made Easter decorations produced within an occupational therapy program

a. Problem presentation

Some social inclusion companies develop pre-employment programs with occupational therapy workshops to teach people diverse tasks.

In our example, 6 people with intellectual disabilities and mental health problems are making Easter decorations and greeting cards, applying quilling technique. The figurines are hand-made under the guidelines and supervision of the occupational therapist; therefore, it takes time and requires craft materials, which are quite expensive. Hence the final price of the product is twice higher in comparison with the price of similar Easter decorations manufactured, i.e. in China.

Several problems arise: how to better sell the produced outcomes, keeping the higher price; how to motivate consumers to buy them instead of cheaper alternatives on the market; how to better present to the community the added value of such decorations.

To sum up, the objective is to reach a satisfactory amount of sells to continue the occupational workshops, being of high importance for people engaged in their activities.

b. Traditional solution.

Two isolated marketing actions were developed:

- First, the team responsible for the occupational therapy activities together with the people with disabilities who are producing the products are regularly participating in a **specialized fair** for Social Enterprises and Cooperatives of People with Disabilities. The goods produced during the workshop are sold on specially designed promotional stands.

- Second, **2 municipal enterprises**, located in the region of Plovdiv, are committed to buy a certain amount of decorations and greeting cards, as part of their social responsibility as a public entity.

c. Theoretical SIM concept that can be used to solve the problem

1. Brand-logo redesign in a Social Inclusion Company

The brand is a text, a symbol, a graphic, or a combination of all of them that allows identifying the goods and services offered by a company in order to differentiate them from the competition. In non-profit companies, the brand is also important, insofar the brand conveys the identity of the organization, its values and its raison d'être. So, the components of a brand are:

- *Name or Phenotype:* this is part of the brand (words, letters and/or numbers) that can be pronounced. It is the verbal identity of the mark.
- *Logo:* the part of the mark that appears in the form of a distinctive symbol, design, colouring or lettering. In some cases it can be the graphic representation of the name, (the proper spelling with which the name is written) and it is part of the visual identity of the brand.
- *Graphemes:* These are drawings, colours or representations that cannot be pronounced. It completes the visual identity of the brand.

Brands are forced to evolve in order to be active, competitive, fresh and adapted to the changing environment. A brand redesign can help the product (good or service) appear more interesting and can even serve to re-position the product by increasing its perceived quality and consumer trust in the brand.

In social inclusion companies, the brand is relevant because it is used to communicate the essence of the organization. A brand must be congruent with the identity of those who love it. and social inclusion organizations need to invest in brands to encourage brand love. The brand must be made tangible in the organization through different tools: the web,

social networks, employee uniforms, merchandising material, letterheads, email signatures, facilities, packaging (in the case of tangible products), etc. This creates a sense of belonging, indeed, the different agents (workers, customers, family members) can identify with the values of the organization synthesized in the brand and contribute to its good functioning.

2. **Product innovation in a Social Inclusion Company**

Companies employing people with disabilities need to gain a bigger market share. To this end, they need to produce a wider assortment of products (for example, handmade souvenirs and products). To innovate, product designers can attend different national holidays in a particular country, such as Mothers day, San Valentines' day, Christmas, Easter etc; or even other important data, such as communions and weddings.

When designing a new product, its selling proposition must be clear. If the audience does not perceive something valuable, interesting, new, fresh and different from the competence, it will not be interested in the offer.

A product can be unfolded into four levels:

- *Essential product:* it refers to the basic service performed. For example, a crystal bottle helps to carry on liquids.
- *Actual product:* it is related to the way it is presented to the audience and its basic characteristics. For example, a crystal bottle can have several sizes and weights.
- *The augmented product:* is that part of the product that exceeds the expectations that consumers have placed in it. The product is acquiring value to become the favourite object of consumers. For example, the packaging of the crystal water, its brand, an additional function not initially expected.
- *Potential product:* it is the one, which over time, can become a much better one, i.e. the new versions of the product.

d. <u>**Marketing action/s to solve the problem**</u>

Based on these concepts, an organization can use diverse marketing tools to reach to SIM purposes: (i) to create awareness and (ii) to encourage interest/emotion in the target. The final end is to augment the sales of products made by people with disabilities.

To achieve this, the organization needs to develop a branding strategy in order to be better recognizable and distinguished by the target groups. Several marketing strategies are available:

Action 1: *An identity reinforcement strategy to communicate the values of the institution.*

- A brand logo redesign, specially designed for the products of the occupational workshops will be produced.

Action 2: *A product innovation strategy to attract interest and encourage sales.*

- In order to gain a bigger market share, the workshop plan to produce a wider assortment of handmade souvenirs and products. The production will follow the different national holidays in Bulgaria, as well as specially made souvenirs for Mother's day, San Valentines' day, Christmas etc. The next step is to offer Dating & Wedding handmade items.

Action 3: *A social media communication strategy to transmit the added value of the institution in the disability sphere and to encourage sales.*

- The company could organise on regular basis online campaigns in social media, where information, photos and give-aways will be shared.

Action 4: *A public relations strategy to transmit the added value of the institution in the disability sphere and to encourage sales, focused on different targets (companies and persons).*

- The organization can develop physical events with the endorsement by celebrities & cooperation with other companies and organizations.

ENCOURAGING PEOPLE WITH PHYSICAL DISABILITIES TO EXERCISE

4.2.5. Motivating people with physical disabilities to engage in physical exercise and enjoy its benefits

a. Problem presentation

People with physical disabilities have different types of musculo-squeletal alterations causing a decrease of movement in their lives. Lack of activity due to fear or lack of motivation results in obesity, depression, muscle strength loss as well as joint protection and increases the risk of suffer others diseases. Physical activity is therefore vital for people with physical disabilities.

Two physiotherapists working in an association specialized in the care of people with haemophilia and other congenital coagulopathies, want to improve the quality of life of users by motivating them to do physical exercise and enjoy its benefits. To do so, they want to promote healthy lifestyles among users and their families.

b. Traditional solution

The solution implemented so far was to raise awareness among people with physical disabilities and their family of the fact that the physical activity and social inclusion is essential to improve their global health and quality of life, and decrease the risk of others diseases and the fear at movement. The strategies adopted were:

- Keeping informal talks with the target group and their families.
- Putting posters in public places.

- Living brochures at the municipality reception.

- Emailing and phoning users to answer questions during office hours.

c. Theoretical SIM concept that can be used to solve the problem

Marketing provides us with different strategies or applicable ways to find a solution to the problem posed.

1. Strengthen corporate identity strategy. Expanding into new services.

Most associations in the disability field believe that a corporate identity is simply having a recognizable logo. However, having a strong corporate identity helps every organization convey its personality and values while being a powerful tool to make a positive impact in the minds of its users. The items to consider are:

- Differentiation and visibility: a good corporate identity differentiates the organization from the competition and provides the highest visibility indicating that they offer the best possible services with the highest quality.

- Ease of identification: it can help any organization to build a separate image of their business organization, for instance, expanding into new services.

- Image and reputation: the image and reputation of the organization depends on the quality of services provided.

2. Stakeholder engagement strategy

Effective stakeholder engagement will help to understand perspectives different from those of the organization, while increasing stakeholder commitment to better planning and improving decision making on key issues. In fact, when it comes to ensuring effective stakeholder engagement, it is essential to tailor communication to each individual or group to gain greater involvement.

3. Communication campaign to raise awareness about physical exercise

This marketing strategy consists of designing an appropriate communication message and choosing the right media to raise awareness of a relevant topic among the target audience and bring about behavioral changes. The success of communication increases when messages are transmitted through various media (mass and personal), in a consistent and regular manner. Communication campaigns must be adapted to the target audience, both in terms of the creativity and content of the message and the media chosen. Targeting people with disabilities is not the same as targeting their parents or even the community at large.

d. **Marketing action/s to solve the problem**

The challenge is to increase the number of users enrolled in the physical exercise program. The target audience are people with haemophilia and other congenital coagulopathies and their families.

Action 1: *Creation of a "FisioHemo" logo and include a new slogan.* The red and white dolls symbolize haemophilia and create an "S" between them. This "S" stands for Health. It wants to represent the role of physiotherapy in the health of people with haemophilia. The slogan is "**move your body, improve your health**".

Action 2: *Bayer pharmaceutical lab support.* Participation in a video for YouTube with a pharmaceutical company (BAYER) together with a haematologist and a haemophilia patient: the benefits of physical exercise in patients with hae-mophilia and recommendations for physical activity.

Action 3: *Realization of the sociocultural event HEMOFEST.* Organizing an event with the aim of disseminating in the neighbourhood where the headquarters is located. Information about this pathology with the support of other associa-tions in the area of people with haemophilia.

Action 4: *Improving quality of life with rehabilitation. Exercises workshops* are launched for people with haemophilia with the aim of improving their quality of life.

Action 5: *Social media tools.* Organization of several Webinar. Support of SOBI Phar-maceuticals.

5. **GOOD PRACTICES: DEVELOPMENT OF FOUR EXTENDED REAL CASE STUDIES**

5.1. Good practices: Absenteeism of care assistants

How to reduce the level of absenteeism of care assistants?

Graça Leitão

APCC – Associação de Paralisia Cerebral de Coimbra

Mini Case Contents:
1.   **Brief description of the organization**
2.   **Problem presentation**
3.   **Traditional solution**
4.   **SIM solution: Strategic and Operational approach**
    4.1. STRATEGIC APPROACH: Social marketing Benchmark
    4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem
    4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?
5.   **Expected results: Usefulness of the proposal**
6.   **Evaluation**

How to reduce the level of absenteeism of care assistants?

1.   BRIEF DESCRIPTION OF THE ORGANIZATION

APCC activity began in 1975 with the efforts of a group of parents and technicians. The Rehabilitation Center of Cerebral Palsy of Coimbra (CRPCC) was soon created, aiming at the rehabilitation of children with Cerebral Palsy and related neurological diseases. In September 1977, with its officialization, the CRPCC started to have its own management. The Occupational Activities Centre is one of the services of the APCC and it has existed since 1992.

This service is aimed at people with disabilities or severe disabilities, with significant limitations of activity and restrictions on participation, aged 18 years or older.

The agreement includes 144 clients and about 63% are between 35 and 65 years of age.

The monitoring of clients and the development of activities is ensured by a team made up of technicians, care assistants, teachers and monitors.

2.   PROBLEM PRESENTATION

In our daily work and in maintaining the quality of services provided, which translates the quality of life of our users, the role of assistants is essential. The problem arises at the level of attendance of these professionals. The high level of absenteeism requires the constant reorganization of the service.

3.   TRADITIONAL SOLUTION

From the analysis carried out, the financial part was found to have great relevance in the absence of assistants. Schedules were reorganized in a more individual way, according to the worker and the service to be performed. A slight improvement in absenteeism was recorded.

4.   SIM SOLUTION: STRATEGIC AND OPERATIONAL APPROACH

4.1.   STRATEGIC APPROACH: Social marketing Benchmark

To change behaviors that cause the absenteeism problem there is the need to:

- Be attentive and responsive to subtle indications of worker unhappiness or stress and create a space for dialogue with regular and defined periodicity;
- Organize a space for the dissemination of "good practices" in each room;

- Make the rules regarding absences and absences well understood;
- Create some positive reinforcement mechanisms for the performance of the function;
- Increase motivation and engagement.

It is very important to have a strategic approach to the solution, through a study of the 8 benchmark criteria (**Table 6**):

Table 6. Eight benchmark criteria

1- Costumer orientation	**Secondary data (Characterization of the segments; Data of absenteeism); Primary data: Focus groups (7 assistants + 1 person directly responsible of performance)**. The following areas were analyzed: 1. What is the organization's culture for you? 2. How do you rate your role in the organization? 3. Excluding urgent situations, what you consider when you need to be absent? (Overburden of teammates; Quality of services provided; Financial issues; Impact on users' lives). 4. **Which are the expectations regarding your role?**
2- Behavior	Actual: High absenteeism levels of care assistants. Desired: Reduce absenteeism to levels that have reduced impact organization and service to "clients".
3- Theory	The COM-B Model of behavior and the PRIME Theory of motivation.
4- Insight	• The organization's culture is, for the most part, linked to the principles of work in the social area, namely respect for others and their condition ("nothing is impossible, anyone can do things, but in their own way"); • The spirit of mission was also mentioned, the "wearing the sweater" and the union in adversity. However, among the assistants who have been at the APCC for fewer years, little knowledge of the organization's culture has been reported. • Everyone sees the role of helping as essential in the organization's functioning and should be more respected. Despite being a function with great physical and psychological overload, they recognize that it is rewarding. • Most refer to pondering: the burden that their absence will bring to colleagues and the financial issue. • They have expectations regarding the improvement of their functioning, namely in terms of communication, which should be clearer.
5- Exchange	**Costs:** Cost of reorganization; Cost of improving working conditions; Cost to improve better service quality. **Benefits:** Positive feedback; Better working relations; Better service quality; Change in personal habits (individual level).
6- Competition	Personal life is expected to be the main competitor to the desired behavior.

Table 6 *(cont.)*. Eight benchmark criteria

7- Segmentation	Caregivers:			
		Total	**Women**	**Men**
		26	18	8
	Age			
	<30			1
	30-50		7	5
	50-60		8	2
	60		3	
	Years in APCC			
	5-10	10		
	10-20	6		
	20	11		
8- Method mix	**Control** • Prepare/review policies in absenteeism; • Greater articulation between direct managers and HR, in order to provide greater clarity and consistency to the implemented rules. **Inform** • Weekly feedback to each member and to the group performance; • Make the rules regarding absences well understood. **Design** • Define a clear profile for the potential new hiring's; • Establish a goal for group absenteeism and place a smiling emoji in the chat each week the goal is reached; • Form group with care assistants and other team members to discuss problem and suggest solutions. Allow 1-hour weekly meeting to the group creating a space for dialogue with regular and defined periodicity; • Create some positive reinforcement mechanisms for the performance of the function and implement a suggestion box; • Implement a monthly satisfaction survey and feedback to the team; • Organize a space for the dissemination of "good practices" in each room.			

4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

After having studies and analyzed the problem, considering the traditional solution that had been given, and having adopted a strategic approach to the solution, through a study of the benchmark criteria, it is now possible to develop the operational approach that transforms the objectives into concrete actions. Operational marketing is the means to achieve the objectives set by the company. It is therefore a matter of defining the internal marketing, motivation, communication or any other action that to carry out.

According to the focus group's results conducted by the company during the research on the target audience (costumer orientation), 2 campaigns should be implemented:

1- *Company culture communication*

Company culture is the set of values, communication styles, beliefs and behaviors that constitute the personality of an organization. A strong company culture will make employees feel more engaged, involved and enthusiastic about their work and responsibilities. In order to achieve this strength, an effective and transparent internal communication is required, that highlights and aligns the organization's mission, vision and values with the perspectives and needs of its employees, and that ensures and enables two-way dialogue to build a culture of trust.

Several possible actions could be appropriate, in order to improve the internal communication of the above-mentioned company culture:

- **Action 1:** Prepare/review policies in absenteeism. Greater articulation between direct managers and HR, in order to provide greater clarity and consistency to the implemented rules. Make the rules regarding absences well understood.
- **Action 2**: Training courses or seminars for anxiety, stress, or problems that may promote absenteeism.
- **Action 3:** Organizing a space for the dissemination of "good practices" in each room.
- **Action 4:** Establishing a goal for group absenteeism and place a smiling emoji in the chat each week we reach the goal.
- **Action 5:** Defining a clear profile for the potential new hiring's.
- **Action 6:** Stand up meeting: Forming group with care assistants and other team members to discuss problem and suggest solutions. Allow 1-hour weekly meeting to the group creating a space for dialogue with regular and defined periodicity.
- **Action 7:** Creating some positive reinforcement mechanisms for the performance of the function and implement a suggestion box.

2- *Motivational and engagement campaign*

According to King et al. (2022) "Motivation" refers to all the brain processes that energize and direct behavior: In this sense, behavior is understood as part of an interactive system in which positive behavior occurs when employees have the opportunity to perform it, and are more motivated and committed to doing it than any other behavior at the time. There are many fashion of creating employee engagement in the workplace, for instance, a strong and supportive leadership, a positive work environment and a culture of trust. Nevertheless, it should not

be forgotten that new ideas and new initiatives can also spark the enthusiasm of caregivers (Berkel et al. 2021).

The engagement and motivation campaign may include activities that reinforce the day-to-day with the prospect of recognition events or appreciation ceremonies, such as:

- **Action 1:** Display the vision and mission on eye-catching colors posters, with emotional photos, showing the importance and love that caregivers received from clients. The poster style should be also more in fitting with the current times and having a slick tabloid-like design that includes emotional photos with sentences about company mission ant vision.
- **Action 2:** Sharing a monthly video or newsletter, discussing updates, progress, and employee questions. Responsible person encourages caregivers to show comments and questions.
- **Action 3:** Improving the engagement with new digital channels, so employees could access more news and information via their own digital devices.
- **Action 4:** Updating content and messaging to make sure it stays relevant, reminds employees of the continual importance and to keep it fresh in everyone's minds.
- **Action 5:** Smaller events in each room or location to create an atmosphere and excitement for the big event and to build the celebration of the event.
- **Action 6:** Involving family members to participate in the activities and publish photos with each team and their helpers showing the hard work but the satisfaction for their good execution.
- **Action 7:** Empowering employees with internal resources and formation activities. It is known that employees need to feel their best — mentally and physically — to contribute to a healthy company culture.

4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

Given all the possibilities that have been shown above for the two main campaigns, only some of them have been selected, according to the needs of the target audience.

1- Company culture communication

a. **Target:** All caregivers, although this action implies a prior articulation with the organization managers and decision makers.

b. **Objectives:**

- Communication of policies in absenteeism.

- Communication to provide greater clarity and consistency to the implemented rules.
- Communication to inform a clear profile for the potential new hiring's.

c. Action: Clarifying the internal rules managing a meeting

Company are going to organize a **Stand-up meeting.** The general idea of this type of meeting is basically to synchronize the work teams through timely communication, interaction and collaboration between the different caregivers and the company in order to strengthen and help each other. **Within 3 moments:**

i. Showing in a **power point** the importance of the role of assisting in the quality of life of the user/client and in the fulfillment of the team and organization goals.

ii. Value of teamwork demonstrated through collaborative play.

iii. Clarification on legislation (Absences) starting with Quiz (Kahoot).

d. Creativity

- Each meeting will be named with a phrase that reflects the idea and content of the meeting

- March 23-24: **CHANGE THE GAME! BETTER TOGETHER THAN ALONE!**

e. Timetable: Organizing meetings every two months.

Month	Date
March	23;24
May	25;26
July	13;14
September	28;29
November	23;24

f. Media. The regular meetings will be communicated by e-mail.

- Meetings will take place every two months.

- Caregivers will be divided in two groups of 11 participants each.

- An email will be sent to everyone, explaining the content of the actions and motivating their attendance.

- A reminder will be sent close to the date of each action.

g. **Responsible for the action**

- Human resources department

2- *Employee engagement and motivational campaign*

a. **Target: all the caregivers**, although this action implies a prior articulation with the organization managers and decision makers.

b. **Objectives:**

- Incentivize caregivers who do a good job, acknowledging their work.
- Achieve a professional development.
- Increase the pride of belonging to APCC.

c. **Actions**. **Engagement and motivation campaign:**

- Include activities that reinforce the day-to-day with the prospect of recognition events or appreciation ceremonies.
- Display the vision and mission on eye-catching colors posters, with emotional photos, showing the importance and love that caregivers received. The poster style should fit with the current times and having a tabloid-like design that includes emotional photos with sentences about company mission and vision.

d. **Creativity**: To improve engagement and to motivate caregivers, the company has displayed the vision and mission on eye-catching colors posters, with emotional photos, showing the importance and love that caregivers received (see **Figure 4**).

- 10 emotional photos have been taken, each with a caregiver and a user/multiple user in a daily action that shows the good feelings and comforts of the work of caring for others.
- A short sentence summarized the daily mission of the caregivers.
- These photos should be hung in large format in places where they can be seen by everyone.

e. **Timetable. How much time?**

- The company intends to place the photographs during the year 2022.
- At the end of the year the results will be analyzed and new photographs and new messages will be developed.

f. **Media: Where are you going to post the photos?**

- *The* photographs *will be placed in a space of institutional visibility.*

...PORQUE ABRAÇAS O CALOR!

... PORQUE A CREDITAS NO MEU PODER!

...PORQUE JUNTOS É MAIS FÁCIL!

...PORQUE ME OFERECES O FRESCO SALGADO !

..CONTIGO NASCEM PERSONAGENS DE PAPEL!

...PORQUE ÉS O SOM DOS MEUS PENSAMENTOS!

...PORQUE ÉS O MEU MOVIMENTO!

...PORQUE AS NOSSAS LINHAS CONTAM HISTÓRIAS!

Figure 4. **TEN emotional photos that shows the good feelings and comforts of the work of caring for others**

Source: Rasche & Seisreiner (2018).

5. EXPECTED RESULTS: USEFULNESS OF THE PROPOSAL

5.1. CAREGIVERS' COMPETENCES/SKILL/ABILITIES

Competencies

- Higher motivation to carry on their work;
- Responsibility and Perseverance;
- Learning to work in a team based on assertiveness and constructive criticism;
- Improving clients' quality of life.

Skills

- Communication Skills;
- Readiness to change;
- Interpersonal communication.

Abilities

- Self-motivation abilities, to develop the professional tasks from another perspective;
- Flexibility abilities, adapting the daily work to the new changing environments.

5.2. DIRECTORS/RESPONSIBLE PERSON COMPETENCES/SKILL/ABILITIES

Competencies

- Marketing orientation: understanding customer and worker behavior;
- Understanding the main strategic marketing options available to solve various problems in the social sphere;
- Innovation;
- Learning to work in a team based on assertiveness and constructive criticism;
- Improving clients' quality of life.

Skills

- Communication Skills;
- Creativity, decision making and problem solving;
- Work under time and budget limitations.

Abilities

- Time management abilities, attending different problems at the same time adopting new marketing resources;
- Influencing abilities, to seduce other people to change their behaviors.

5.3. USERS OR CLIENT'S COMPETENCES/SKILL/ABILITIES

Competencies

- A deeper knowledge about the companies presented in this subject and its benefits for people with disabilities and for society in general;
- Higher involvement in the disability framework.

Skills

- Communication Skills;
- Interpersonal communication.

Abilities

- Flexibility abilities, adapting the daily work to the new changing environments.

6. EVALUATION

1- *Company culture communication*

Its effectiveness will be measured using these indicators:

- Number of caregivers participating in meeting;
- Number of information requests;
- Number of comments;
- Participations in social media.

2- *Employee engagement and motivational campaign*

Its effectiveness will be measured using these indicators:

- Number of comments about photos;
- Number of likes/questions posed on social media;
- Numbers of clients' family positive/negative comments.

5.2. Good practices: Finding young volunteers for inclusive leisure activities

How to find young volunteers to participate in inclusive leisure activities organised on regular basis?

Lachezar Petkovski
NARHU
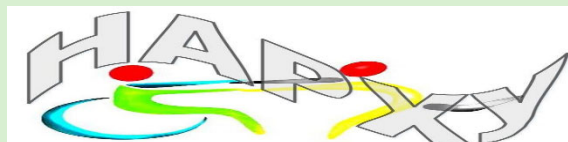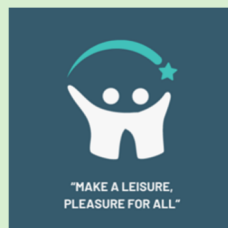
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5. **Expected results: Usefulness of the proposal**
6. **Evaluation**

How to find young volunteers to participate in inclusive leisure activities organised on regular basis?

1.   BRIEF DESCRIPTION OF THE ORGANIZATION

NARHU (National association of professionals working with people with disabilities) is established in Plovdiv, the 2nd largest city in Bulgaria and has been operating for more than 20 years both on national and European levels. NARHU is a non-profit umbrella association, registered in public benefit, which acts as a national representative body of different types of professionals who are working with people with disabilities in the domains of education, employment and social inclusion. Its main activities are targeted towards experts and fieldworkers providing services, counselling and support to people with different types of disabilities and levels of functioning, primarily in the spheres of their employment, vocational orientation, training and social entrepreneurship. The key concepts in the mission statement refer to Quality of Life and inclusion designed for all and Professional Upskilling. The organization creates opportunities for participation in training and working practices on an international level. NARHU cooperates with NGOs, vocational training organizations, universities, and other institutions on regional, national, and international levels.

2.   PROBLEM PRESENTATION: Corporate image strategy (updating & identifying the service)

The leisure activities regularly organized by NARHU are bringing together PwDs and non-disabled youth who inclusively perform various activities. Examples are mountain hiking, playing sports, participation in competitions, board games etc. Due to the inclusive nature of the activities, it is required many young volunteers to participate together with people with disabilities. It turns out challenging to find and motivate young people who are willing to devote time and effort to attend the aforementioned activities.

Within NARHU, a brainstorming session was organized and SWOT analysis was used as a technical tool to analyze the internal strengths and weaknesses and external threats and opportunities to better address this issue. **Table 7** represents the results.

3.   TRADITIONAL SOLUTION: involving stakeholders strategy

The solution implemented is to provide to young volunteers: free accommodation, food and clothing needed for the implementation of the leisure activities. In addition, young volunteers are invited to social dinners and other networking events. Each one of them is awarded an

attendance certificate which indicates the number of hours of volunteer work and the archived intangible outcomes.

Table 7. SWOT analysis

Strengths	Weaknesses
Strong relationships with: • Organizations for people with disabilities – NARHU network of NGOs includes about 124 organizations with more than 500 people who are working on the topic of inclusive leisure activities, involving young people as volunteers. • The local community – the local brands of State Agency of PwD, National organization of PwD, some secondary schools, 3 Universities – all of them, based in Plovdiv, support the work on the topic with academic, practical and professional experience and knowledge. • The local government – Plovdiv Municipality supports the activities on this topic, with great interest.	Financial resources – the aim is to increase the number of the existing young volunteers in the field of inclusive leisure activities to 105. The existing number of already involved volunteers is 22. It is planned to organize a national event, held in Plovdiv to disseminate the topic "Inclusive leisure activities, involving young people as volunteers" and to search for new volunteers. The initial cost for organizing such an event in Plovdiv, BG with a planned 150 participants is 10000 euro (incl. travel costs, accommodation costs for participants outside of Plovdiv, catering costs, rent of hall, production of dissemination materials – approximately 150 participants * 50 euro = 7500 euro + 2500 euro for production of dissemination materials, rent of hall and catering costs). The plan is prepared not taking into account the current existing COVID-19 restrictions. Reaching/engaging young people – main questions to be addressed with the developed strategy: 1. Recruit volunteers through their existing relationships. Do you have an all-star volunteer on your team? 2. Offer shorter, flexible opportunities. 3. Reach out to the programs they are involved in. 4. Allow for position sampling. 5. Establish a social media presence. 6. Make it mutually beneficial. 7. Focus on the cause. 8. Return emails and phone calls within 24 hours.
Opportunities	**Threats**
The trend of bigger awareness about the needs of inclusion of young people with disabilities. However, the following points must be taken into account when addressing young people: 1. Young volunteers must start as young as possible. 2. Families must be involved. 3. The social purpose has to be explained clearly to them. 4. Young people should not be underestimated. 5. Within NARHU young representatives must be involved. 6. Their confidence has to be built. 7. The focus should be on career skills. 8. Schools and universities need to be engaged. 9. Their friends need to be involved. 10. Things has to be kept fun and flexible.	Prejudices of the community against people with disabilities: there is still a belief that nothing can be done about the improvement of the physical disabilities of the people with disabilities. At least 11 stereotypes of disabled people (presented in some movies) are here reported: 1. **The disabled person as pitiable and pathetic** - E.g. Tiny Tim in Charles Dickens' A Christmas Carol and Porgy in George Gershwin's Porgy & Bess. 2. **The disabled person as an object of violence** - E.g. Joan Crawford in Whatever Happened to Baby Jane?" and Audrey Hepburn in Wait until Dark. 3. **The disabled person as sinister and evil** - E.g. Shakespeare's Richard III, and also Black Dog, Blind Pew and Long John Silver in Stephenson's Treasure Island. 4. **The disabled person as atmosphere or curio -** E.g. the characters of Merrick in The Elephant Man and Half Soldier in The Good, the Bad, and the Ugly. 5. **The disabled person as a super cripple** - E.g. the central characters in My Left Foot and Reach for the Sky.

Table 7 (cont.). SWOT analysis

Opportunities	Threats
	6. **The disabled person as an object of ridicule -** E.g. the cartoon Mr Magoo and Harpo Marx of the Marx Brothers. 7. **The disabled people as their own worst and only enemy -** E.g. the central characters in Coming Home and Born on the Fourth of July. 8. **The disabled person as a burden** - E.g. in the recent British television drama Keeping Tom Nice. 9. **The disabled person as sexually abnormal -** E.g. Hephaestus in Homer's The Odyssey and Lady Chatterley's husband in D.H. Lawrence's novel.

A research about the Volunteering of young people in Bulgaria has been conducted and the main conclusion was that while some countries have long-standing volunteering traditions, in others, the voluntary sector is still poorly developed or has yet to emerge. For instance, over a third of young people in Ireland (42%), Denmark (39%) and the Netherlands (38%) have done a volunteering activity, while respondents in Bulgaria (10%), Greece (13%) and Sweden (15%) are the least likely to have done so. Compared to 2011, the largest increases can be seen in Cyprus (+8%), Italy (+7%) and Portugal (+6%) (according to the European Parliamentary Research Service Blog: https://epthinktank.eu/2016/10/20/volunteering-in-the-eu-plenary-podcast/).

Considering the above tools (swot analysis and research results), **Table 8** shows the initial proposal of activities with the stakeholders to get and motivate young people to act as volunteers.

Table 8. The initial proposal of activities with the stakeholders

Stakeholders	Interest in the activity	Likely impact	Communication with them
Schools	High Interest - all students (with or without disabilities) could attend these activities during a school day for example	High impact	Email, Meetings, Personal communication, ...
NGOs working with Young People	NGOs with young people would have a high interest - they could organize such activities / attend or/and present their own projects	High impact	Email, Meetings, Personal communication, ...

Table 8 (cont.). The initial proposal of activities with the stakeholders

Stakeholders	Interest in the activity	Likely impact	Communication with them
Parents of young people with disabilities	Parents with children with disabilities would have a high interest due too that they would be happy for an event, especially for their children where they can participate without any issue or discrimination	High Impact	Email, Flyers, Meetings, Personal communication, ...
Sports (all kinds)	All kinds of sports organizations/clubs would have an interest in this kind of activities where they could help their community, maybe start a section for people with disabilities within their club and make their club known by really getting involved in volunteering with children with disabilities and schools	Medium impact	Email, Meetings, Personal communication, ...
Local municipalities	Local municipalities would have a medium interest - they could present a free space where the activities can take place and might also have an interest due to political reasons in Bulgaria	Small Impact	Email, Meetings, Personal communication, ...

4.   SIM SOLUTION. STRATEGIC AND OPERATIONAL APPROACH

4.1.   STRATEGIC APPROACH: Social Marketing Benchmark Framework

Table 9. Benchmarks (8 Social Marketing reference criteria)

Customer orientation	Understanding the Target Audience needs:
	
	Desk research - research about the Volunteering of young people in Bulgaria;
	
	Formative research:
	❖ A short survey among young people will be delivered with questions like:
	  • Do you want to be a volunteer?
	  • In what kind of activities, do you want to take part as a volunteer?
	  • Do you know people with disabilities?
	  • Would you participate in activities with youngsters with disabilities?
	  • ...
	❖ Interviews with stakeholders and target audience;
	❖ Focus groups with stakeholders and target audience.

Table 9 (cont.). Benchmarks (8 Social Marketing reference criteria)

Behavior	**Desired behavior:** ❖ **More youth involved in voluntary actions.**
Theory	❖ Social Norm Theory – Because young people tend to behave like their peers and if 5 of 15 friends become volunteers the other 10 youngsters will follow in 90% of the cases. ❖ Exchange Theory - to maximize the benefits of feeling fulfilled and happy, growing up and developing skills, doing something useful volunteering, and reducing the benefits of staying inside, playing games, or doing other activities.
Insight	Based on developing a deeper 'insight' approach, focusing on understanding what 'moves and motivates' the target audience to adopt/modify/abandon a behavior, and the barriers faced for adopting it. Insights are defined in **Table 7**, part: Opportunities and Threats.
Exchange	With the proposed strategy of NARHU about "Inclusive leisure activities, involving young people as volunteers", the following are envisaged: ❖ Monetary costs for the organizer: • Spend time – 160 working hours of the staff working on Strategy • Spend Money – planned 10000 euros for organization of National Event + 160 working hour * 9.25 euro/hour = 1480.00 euro => 10000+1480=11480 euro • Travel – calculated within the Budget category: Organization of National Event ❖ Internal barriers and costs for the target audience to acquire the desired behavior: • Young people – lack of interest and motivation, lack of effective time management, don't want to participate without remuneration; • Lack of accessible and welcoming environment. ❖ Benefits for the target audience if they acquire the desired behavior: • Socializing, Making new friends and connections; • Acquiring new skills, especially social skills; • Feeling of having done something that matters and that makes a difference, recognition and acknowledgement of our efforts from the community; • Personal satisfaction; • Future involvement in volunteer activities.
Competition	The **external** actors competing for the time and attention of the targeted audience are: • Bulgarian Red Cross • Other NGOs • Universities **Internal competition:** • Competitive behaviors are going out and have a drink with friends or other kind of activities, rather than volunteering.
Segmentation	Young people can be segmented into the following groups: 1. Young people with disabilities. 2. Young people without disabilities. 3. Young people who volunteer. 4. Young people who don't want to be volunteers or have not decided yet if they want to be volunteers. The focus is on young people that can be volunteers.

Table 9 (cont.). Benchmarks (8 Social Marketing reference criteria)

Methods mix	**Educate:** • Through videos, to participate in the organization of the event, to present successful cases of active volunteers from Bulgaria and abroad; • Meetings with professionals in the field of disability. **Inform:** • Informational campaigns, through social media, flyers, presentations at other similar events, inform youth communities; • Demonstration through youth festivals. • Organization of extra curriculum activities in schools and universities).

Table 10. Relationship with inclusion indicators

The success of this project will ultimately aim to get and motivate young people to participate as volunteers in inclusive leisure activities.

Personal conditions

Each person is an individual and sensitive to different things. This means that not everyone would volunteer for every cause. The first thing to determine is whether the designated people to volunteer would willingly do their job, and with the best of feelings. Second, there is the need to know if they have the necessary knowledge and information to be as effective as possible in their actions and exercises. If there is no certainty about this, it is mandatory to conduct trainings on how to help people with disabilities.

There is no exact profile to determine whether a person can be a volunteer or not. Everyone has their strengths and weaknesses, but the important thing is to have the desire to learn and share support. When it comes to leisure activities, the goal is to attract young, energetic, communicative, and positive young people. This is not an easy task, as requires a great effort to show them how providing support and help to someone else can have huge benefits for everyone - for the people with disabilities, for the volunteers and for society. This is done through examples of other young people helping people with disabilities, their stories, and their successes.

Social participation

Another way to promote this behavior is to show young volunteers examples of famous people and athletes, which encourage this behavior and way of thinking. One way to find volunteers is through research e.g. on the Internet for similar projects and their implementation. The interests of the volunteers should be also considered, thus, in which activity they would feel most comfortable and most eager to get involved.

Employment conditions

NARHU organization seeks volunteers among young people, which means that the activities, time, and other efforts are not paid by definition.

The benefit for a young volunteer is the fact, that the volunteer experience will be part of their CV, and including a volunteer experience section is a great way to stand out as a job candidate. It shows that they are community-minded and gives them the chance to prove their professional skills. The quality work as a volunteer could be a step for future employment within the organization.

In brief, through this campaign, **6Ps of Social Marketing** are considered:

• What is your product? - inclusive leisure activities organized regularly.
• Where is the place of your campaign/behavior? This can be anywhere in Bulgaria, it can be provided by one of the stakeholders (a football field, a school, the municipality could offer a park, like a park Lauta in Plovdiv).

- What is the price? – financial resources; time of the volunteers.
- Who are the partners? - partners will be searched and contacted
- What are the favorable (or not) policies? – A research on policies will be conducted
- How are you going to promote your campaign/project? - Facebook events populating the initiatives, flyers, TV reportage/interviews with participants

To carry on this project, NARHU has:

- A coordinator of the project – a person who is planning, organizing, implementing and supervising the project;
- A PR specialist – the person who is responsible for the negotiation of the public events and campaigns and forming the message of the campaign;
- Active volunteers – people who voluntarily oversee the implementation of the activities.

The first idea is to **implement** the project through 14 events – (2 of them will be large scale conferences), and to **disseminate** it through social media, mainstream media and public, physical events.

4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

NARHU can use diverse marketing tools to reach its objective through this project: (1) to get and (2) to motivate young people to participate as volunteers in inclusive leisure activities. In this sense, the following strategies are proposed:

- **A 360º communication strategy** defining objectives, target, creativity strategy, media, timing, budget. With the possibility to use Influencers in the SM campaigns.
- **Internal marketing strategy** by:
    a. the creation or integration in a volunteer platform, analyzing the possibility of joining other associations/institutions.
    b. the identification of 'ambassadors' among young volunteers.
    c. the creation of a guide for young volunteers.

To this end, first of all, it is necessary to **define the target** of these strategies. The focus chosen was on young people. Before proposing different actions, the volunteer profile need to be identified (see **Table 11**).

Table 11. Main volunteer profile

Age	18-29
Gender	Male or female
Motivations to being a volunteer	• Challenge themselves. • Help and support people with disabilities. • Gain knowledge and connections. • Helping others. • Wanting to learn and gain experience. • Having free time available. • Being devoted to a cause. • Acquisition of new skills. • Higher self-esteem. • New contacts and networks. • Possibility for a future job.
What they want to receive	Appreciation for their work, to receive new knowledge, skills and competencies and new social contacts
Time availability	8-10 days in the summer, 3-5 days in the winter
Place where the volunteer is recruited	At schools, at universities, at other events
Mean of years that the volunteer stays at NARHU as a volunteer	At least 2-3 years
NARH's requirements to the new volunteer	NARHU always need a hand for inclusive leisure activities. The offered volunteer's work supposes: Group Size: from 1 up to 10. Time commitment: Weekdays - 9.30 am to 3.30 pm. Location: Plovdiv, Bulgaria. All year-round, though depending on the need of NARHU's clients. NARHU covers all associated costs and materials.

After this, it is also important to establish specific objectives, smart objectives, to reach with this project. The following **specific objectives** to be reached in one year has been proposed:

Quantitative objectives:

a. The aim is to increase the number of existing young volunteers in the field of inclusive leisure activities with 105. The existing number of already involved volunteers is 22.

Qualitative objectives:

b.   To improve the notoriety of the NARHU volunteering programme.

c.   To increase the motivation of the young volunteers.

4.3.   OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

As stated before, a 360º communication campaign and diverse internal marketing strategies can help to reach the main and specific objectives.

Table 12 offers some recommendations to attract and motivate young volunteers.

Table 12. Recommendations for attracting and motivating young volunteers

Recruit volunteers through their existing relationships. Do you have an all-star volunteer on your team? They could have friends to involve. Recruiting friends of current volunteers also help improve engagement and retention.

Offer shorter, flexible opportunities. Between school, activities, sports, family, friends, etc. it's hard for young people to find the time to volunteer. By offering a variety of schedules and shift lengths, they are more likely to find something that works for them.

Reach out to the programs they are involved in. Connect with leaders of local church youth groups, sports teams, and school clubs to see if they are willing to round up their group to serve.

Allow for position sampling. When talking to a prospective volunteer, layout a variety of position options for them to select from and encourage them to try out new areas.

Establish a social media presence. Meet your prospective volunteer base where they are at—on social media. Keep a regularly updated social media profile and post volunteer opportunities often.

Make it mutually beneficial. Help younger volunteers by offering to provide them with position titles, help with admissions letters, and development of job and life skills.

Focus on the cause. Gen Z is a passionate group. Relate to them by focusing on your mission and highlighting their ability to make a difference for your cause.

Return emails and phone calls within 24 hours. In this fast-moving society, instant communication is a must. Fail to respond to your prospective volunteer within 24 hours and you risk losing them to another organization.

Explain your social purpose clearly. Things that are clear when you're older, are not necessarily as obvious when you're younger. When you explain the purpose of your organization, make sure you make it as clear as possible and provide plenty of examples. The Time Well Spent research showed that one of the main reasons people volunteers is being altruistic and this is true across all ages.

Don't underestimate young people. It's very easy to underestimate young people, but that can often mean that their talents are wasted. A 12-year-old can be very creative. Give opportunities for young people to genuinely contribute with their ideas, and not just follow orders.

Have young representatives (e.g., in steering groups, or as trustees). This gives young people a voice. Avoid the situation where 10% of your board is 'young', and the other 90% 'old'. It is better to include a varied group, or the young person may feel intimidated or be misunderstood easily.

Build their confidence. Confidence is often a big issue with many young volunteers. Giving them clear opportunities to contribute, and working in small steps, helps develop their confidence and show them how volunteering really works.

Focus on career skills. Make clear what specific skills they will develop by volunteering, and how that will help them get jobs. The Time Well Spent research showed that younger volunteers want to develop new skills. So, the more meaningful you make the volunteer role, the easier it will be to attract young people.

Engage with schools and universities. This is the single best method to inform young people, across all social-economic groups, about volunteering. Teachers are busy, so do the hard work for them and provide them with clear information to pass on.

Start as young as possible. The younger your volunteers, the easier it is to develop a lifelong habit of volunteering. For example, the #iwill campaign has volunteers as young as 10. **Get their families involved.** This is particularly effective for primary school-aged volunteers. This lets young people understand the benefits of volunteering while having someone they trust to guide them along the way.	**Get their friends involved.** Create opportunities where young people can work with their friends as a group to make volunteering more fun. 96% of people aged between 10-20 who did social action also know a friend or relative who does social action, which shows the importance of these connections. **Keep things fun and flexible.** Keeping volunteering as informal and flexible as possible helps mitigate the pressures young people face during their studies, or at the start of their careers. Make it clear that volunteering doesn't mean all your weekends become too busy or too boring!

Source: https://www.sterlingvolunteers.com/blog/2018/08/eight-easy-ways-recruit-younger-generations-volunteers/ and https://blogs.ncvo.org.uk/2019/02/04/10-top-tips-on-recruiting-and-retaining-young-volunteers/

4.3.1. A 360º Communication Strategy

In a 360º communication strategy, all the actions/tools must be aligned. That is, it is necessary to define a **single axis of communication** with which to reach the audience, regardless of the media used. For this reason, the first step is to develop the axis of the communication. **Table 13** shows this axis.

Table 13. Axis of the 360º communication strategy

The term 360-degree communication stands for integrated measures in which specially prepared content is played at all touchpoints. Often enough, the same content is placed on as many channels as possible. NARHU focuses on topicality, relevance, context and synchronization and we use our available tools strategically to reach, in an ideal way, our desired target group.

Simple strategies can improve the communication efforts and strengthen your ability to communicate effectively with all of your young volunteers. Sharing ideas, describing opportunities, clarifying problems, and articulating a vision—commonly referred to as communication—is part of the critical work of a program coordinator. This work can become more manageable by employing a few simple strategies.

Strategies

- Communicate early and regularly. Focusing on regular communication gives people time to provide real feedback, allows for missed communications and builds trust.
- Simplify the message.
- Reduce the jargon. To make your messages easier to understand, translate your area's jargon when communicating with anyone outside of your area.
- Highlight the benefits, not the features.
- Provide internal clarity first. To set a clear path, avoid mixed messages and internal wrangling, which could lead to stakeholders saying things like, "Wait. What are we doing?" or "No, I told the department we could not invest in their projects next summer."
- Segment the audiences. Perhaps the most critical strategy is understanding that the same message may need to be delivered to relevant audiences at different times, through different channels, and using different languages. Speak directly to what each audience (students, family members, administrators, staff) cares about.
- Streamline the channels. Stick to the most effective channels for each audience, and do not rely on rebroadcasts for truly important communications.

In the following lines, diverse communication actions are proposed.

Action 1: Campaign on Facebook

a. Target

To reach as many young people as possible, since almost all young people use Facebook, not only as a form of contact and sharing information, but also for educational and personal purposes. In fact, through this social media, young people receive news and advertisements on topics that interest them. Also, it can show you pages and events that your friends will join.
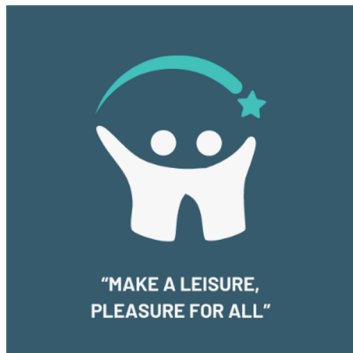
b. Creativity

Firstly, on NARHU Facebook page, the Logo with the Slogan of the project is shared:

Secondly, on the Facebook page, young people are introduced to the aims of the project, the partners of the project, the outcomes of the project and the stakeholders involved. Also, various pictures and information from other NARHU projects are uploaded, and also information about future events for volunteering (due to the COVID-19 situation and the restrictions from the local government, events cannot be guaranteed).

Organization of event, dedicated to the topic:

1. Ruse, Bulgaria, 31/05/2021 - https://www.facebook.com/NARHUbg/videos/1953126774864078
2. Plovdiv, Bulgaria, 06/11/2021 – https://www.youtube.com/watch?v=SSqUDfu3GYk
3. Burgas, Bulgaria, 02/10/2020. Pictures:

Thirdly, information are given about the leisure activities and what kind of young volunteers is needed.

Fourthly, it will be explained what every young person will receive and learn if they decide to volunteer in our organization, like challenge themselves or gain knowledge and connections (see "benefits" of target audience, **Table 10**, for the full list).

c. Media

Facebook.

d. Timetable

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Creation of the Facebook page	Uploading materials and news about our future event for attracting volunteers	Communication with our target group / Uploading materials and news about our future event for attracting volunteers	Communication with our target group / Feedback	Communication with our target group / Feedback	Posting news for our event this month	Uploading materials and news about the event and how many young volunteers we reached	Communication with our target group / Feedback	Communication with our target group / Feedback	Sharing news and photos of events in which our new volunteers have participated	Communication with existing and potentially new volunteers	Posting news for our event this month

e. Budget

The budget for the Facebook page is 220 euros.

f.   Responsible for the action and other human resources needed

The Facebook page will be created by the project coordinator of NARHU. Also, he will oversee communicating with the target group for the first four months. After that, a volunteer of the organization can start maintaining the Facebook page. The volunteer and the project coordinator must have regular meetings every week, in which they will discuss the progress and future plans of involving young volunteers.

Action 2: Organizing large scale events

a.   Target

Every 6 months, Narhu will organize a large-scale event (via the Facebook page) in a hotel in Plovdiv that will bring together 50 young people to attract them as volunteers. After the event, feedback will be gathered from the young people about their thoughts on the project and what they think it could be improve. E-mails will be also collected to send them newsletters.

b.   Timetable

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
					Large scale event in Plovdiv						Large scale event in Plovdiv

c.   Budget

Cost of the hall for the event = 150 euros.
Food and beverages + dissemination materials – 50 people * 7,5 euro = 375 euros.
Dissemination materials = 100 euros.
Total for the 2 events: 1,250 euros.

d.   Responsible for the action and other human resources you need

The project coordinator.

Action 3: Organizing informative sessions/meetings with Universities, Public Schools, and Youth Structures

Objective to reach with this action: young people 18-22 years old.

a. Target

For this action existing poster for dissemination of our future events will be used for attracting volunteers at Public Schools, Universities and Youth structures, which are part of NARHU's Partner Network. The events will take place in Plovdiv. A hall for the event should be rented by project coordinator, which will be close to the School/University/Youth Structure. The target number is 20 young people.

b. Creativity

Poster

Brochure

The same poster will be used for all events, just the dates will be changed accordingly. Also the brochures will be printed and put at every entrance of the Schools, Universities and Youth structures.

c. Timetable

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people	Dissemination /Event with 20 people

d. Budget

Rent of hall = 100 euros

Food and beverages for 20 people - 20 people * 7,5 euro – 150 euros

Dissemination materials – 150 euros (for all events)

Total – 250 euro* 12 months +150 euros = 3,150 euros

e. Responsible for the action and other human resources you need

The project coordinator with the help of 2 volunteers will organize the events every month.

4.3.2. Internal Marketing Strategy

Once enough young people are gathered as volunteers, the challenge is to constantly improve communication, engagement, and maintain their interest in the years to come.

In the following lines, diverse internal marketing actions are proposed with this scope.

Action 1: Weekly, monthly, Yearly meetings

- *Weekly or bi-weekly:* project coordinator meetings with 10 volunteers for discussion of feedback of the volunteers, next events, information about the Facebook page.
- *Monthly:* project coordinator meetings with Board of Directors about the feedback of the volunteers, next events, information about the Facebook page, new projects and volunteer's role in them.
- *Annually:* 2 meetings with the Project coordinator, board of Directors and all volunteers. These meetings aim to make a close connection between the staff of Narhu and the volunteers. Also, to give them a sense of feeling that they are valued and recognized for their work in the organization, and maybe for a future job in the organization.

a. Timetable

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Director	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors	Project coordinator meetings with 10 volunteers / with Board of Directors /

b. Budget

The budget needed to rent a hall where all the volunteers and staff of NARHU can gather and share information is of 300 euros.

Action 2: Creation of a volunteer platform

a. Target

All the volunteers.

b. Aims of the platform

The target of this Action is to allow at all time all volunteers to have access to all materials, future events, future projects, news, communication between each other, communication between them and the project coordinator. In this platform they can also become moderators and administrators (with the permission of the project coordinator), post various materials that they think can help the other volunteers, post new ideas and have a chat room. Via this platform, the volunteers can be grouped based on their age, interest, skills, knowledge and others.

c. Timetable

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Buying the hosting and domain name of the platform	Install and set up the Moodle platform environment	Starting registration of the volunteers	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback	Uploading news, materials, tasks / Getting feedback

d. Budget

The hosting of the platform costs 75 euros per year and the domain costs 14 euros per year. The platform itself is open source and it is free for installation and usage. Moodle platform will be used, since it has a modern and easy-to-use interface, personalized dashboard, all-in-one calendar, notifications, forum, chat and many more. **Total: 89 euros**

e. Responsible for the action and other human resources

The project coordinator will work with the IT researcher of the NARHU organization.

In sum, **Table 14** shows the actions and budget proposed with the aim to recruit and motivate young people to participate in inclusive leisure activities organized on regular basis.

Table 14. Actions and budget proposed

Marketing strategy	Actions	Budget
360º Communication Strategy	Action 1: Facebook page	220 euros
	Action 2: Large-scale events	1,250 euros
	Action 3: Info-sessions	3,150 euros
Internal Marketing Strategy	Action 1: Regular meetings	300 euros
	Action 2: Creation of a volunteer platform	89 euros
	Total amount	**5,009 euros**

5. EXPECTED RESULTS: USEFULNESS OF THE PROPOSAL

As **Table 15** shows, with this proposal, diverse competencies, skills and abilities can be reached among young people that participated in this volunteering project.

Table 15. Competencies, skills and abilities among young volunteering

Competencies	Skills	Abilities
Motivation to participate in this programme. Knowledge. Experience. New contacts and networks.	Higher self-esteem. Better communication skills. An open mind to future jobs.	Challenge themselves. How to help and support people with disabilities. How to help others. Flexibility abilities

Together with this, the proposed actions will help young people be devoted to a cause, free time available, and the possibility for a future job.

6. EVALUATION

The marketing strategies and actions can be measured considering the following indicators (**Table 16**).

Table 16. Evaluation

Marketing strategy	Actions	Evaluation
360º Communication Strategy	Action 1: Facebook page	Questionnaires related to the content of the page and its satisfaction: pre and after its building. Number of followers. Number and contend of comments. Number of likes.
	Action 2: Large-scale events	Number of assistants. Degree of satisfaction. Number of information requests.
	Action 3: Info-sessions	Number of assistants. Degree of satisfaction. Number of information requests.
Internal Marketing Strategy	Action 1: Regular meetings	Number of assistants. Degree of satisfaction. Feedback of assistants.
	Action 2: Creation of a volunteer platform	Functional check.

5.3. Good practices: Young people playing sports

**Why do I no longer have children
and young people playing sports?**

AnaBela Marto

APCC – Associação de Paralisia Cerebral de Coimbra

Mini Case Contents:

1. **Brief description of the organization**
2. **Problem presentation**
3. **Traditional solution**
4. **SIM solution: Strategic and Operational approach**

    4.1. STRATEGIC APPROACH: Social marketing Benchmark

    4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

    4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

5. **Expected results: Usefulness of the proposal**
6. **Evaluation**

Why do I no longer have children and young people playing sports?

1.   BRIEF DESCRIPTION OF THE ORGANIZATION

The Department of Physical Education and Sport is one of the services of the APCC that responds to different social responses, with about 160 practitioners, from school children to adults. It has existed since 1982 and aims to provide people with disabilities with access to quality sporting activities both at recreational and competitive levels. One of our bets is competitive sport, especially on: Boccia, Swimming and Frame Running, where we have achieved very good sporting results both nationally and internationally. At this moment we are facing the aging of our practitioners and with difficulty in getting more children and young people to look for us to play sport. With the inclusion policies of all children in public schools, the APCC started to receive people with disabilities more and more later.

2.   PROBLEM PRESENTATION

Currently, the organization is faced with a small number of children and young people playing sports, which jeopardizes the continuity at the APCC. In addition, there is a lack of personnel taking care of young people after they finish school.

3.   TRADITIONAL SOLUTION

Since now, APCC is working together with the rehabilitation teams to make families be aware of the added value of sports practice for their children, but without following a structured communicating program, just through informal conversations.

4.   SIM SOLUTION: STRATEGIC AND OPERATIONAL APPROACH

4.1. STRATEGIC APPROACH: Social Marketing approach

Swot-Analysis

- The organization has analyzed its external environment and realized that there is a lack of young people with disabilities practicing sports despite their interesting therapeutic purposes. Therefore, the main threat is: the lack of awareness among citizens in general, and among those affected in particular (young people with disabilities and their families).

- The organization has analyzed its internal environment and has identified that the organization's strength is the great deal of knowledge and experience in caring for young people with disabilities. The greatest weakness is the lack of staff to be able to offer a wide range of youth care services compatible with the work of parents and the school calendar of young people.

Objectives

In this framework, the objectives to achieve to address the problem would be:

- **Sensitize parents** to the importance of sports and involve them in accompanying their children to sports activities;
- **Sensitize doctors and physiotherapists** so that in their consultations they talk about the benefits of practicing sports to families;
- **Raise awareness of physical education teachers** for the inclusion of students with disabilities in their activities and to promote adapted sport to parents;
- Attract **volunteers** to extend the sports attendance schedule so that it does not coincide with the working hours of parents (who must accompany their children to the sessions).

Target identification

Different targets should be reached through different marketing tools to address this problem:

(i)   Parents whose awareness of the virtues of sporting activity needs to be reinforced;

(ii)   Therapists and doctors whose involvement in this awareness-raising activity needs more impetus;

(iii)   Overworked employees who need external support (possible volunteers) to be able to solve the problem at the most appropriate times.

4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

Based on the strategical analysis, two main operational marketing tools will be developed to solve the problem: (i) an awareness communication campaign in a Social Inclusion Company and (ii) a public relations event to attract volunteers.

Awareness communication campaign in a Social Inclusion Company

This marketing strategy consists of designing an appropriate communication message and choosing the right media to raise awareness on a relevant issue among the target audience and

to bring about behavioral changes. The success of this communication is enhanced when messages are delivered through a variety of media (mass and personal) in a consistent and regular manner. In order to get the message across, it is necessary to motivate the target to bring about the desired change. A good way to do this is to show the favorable results obtained by changing behavior in the desired direction. In other words, positive reinforcement messages. Negative messages can also be used to show the devastating effects of not applying the recommendations, followed by reassuring solutions about how to avoid these negative consequences. Such campaigns are highly impactful and can bring about the desired changes in certain areas, for example, when promoting alcohol and/or tobacco cessation, or the eradication of reckless driving. In any case, social involvement has to be promoted in order to achieve the announced goals.

Communication campaigns must be tailored to the target audience, both in terms of the creativity of the message and the media chosen. It is not the same thing to address the trainers of people with disabilities as it is to address their parents or even the people affected themselves.

In sum, using marketing tools, APCC proposed to develop an awareness campaign that will increase the number of children playing sports.

Public Relations in Social Inclusion Companies

Public relations tool is a marketing communication strategy used in the long term to consolidate a solid brand image among different agents, to get their involvement with the company (workers, volunteers, public administrations, clients, suppliers, etc.). The objective is not to increase sales in the short term, but to establish lasting and solid links between the organization and its different stakeholders.

The final objective of Public Relations strategy is to obtain responses from the audience. Several tools can be used to this end:

- *Publicity:* this consists of getting the media to talk about the organization free of charge. To get the media to talk about your organization, there is the need to generate content (e.g. by inviting a celebrity, holding an event, launching some new services etc.).

- *Events:* these consist of meetings of various agents with whom you wish to strengthen ties on the occasion of an anniversary, presentation of a new service, etc. They increase empathy between the client and the organization. It is interesting to have sponsors for events in order to reduce their cost and improve their dissemination.

- *Fresh and current content:* this consists of creating promotional videos about the organization's activities, writing blogs on related and current topics.

- *Internal magazine or newsletters:* this consists of preparing a publication in physical or digital format with a certain frequency (normally monthly) that brings the organization's day closer to the audiences with which it wants to connect.

4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

Two marketing operational tools will be developed to reach the different mentioned targets and solve the problem.

Action 1: Awareness campaign focused on parents and doctors/
physical therapists/teachers

a. Target audience

In general, all families are concerned with giving their children the greatest number of experiences from an early age, which also involves involving them in sports activities. When children have a disability, rehabilitation concerns are usually the priority.

The objective of the campaign is to get parents to see sport as an important part of their children's rehabilitation and to get to know the contribution of sport to quality of life.

As doctors, therapists and teachers are the ones who have the greatest influence on parents, the campaign aims to attract parents through these professionals.

b. Content of the campaign and media planning

The campaign is based on the creation of a set of posters with photos of children playing sports in which the benefit of sports is highlighted, and on the organization of two practical events where parents can come with their children to try out the modalities.

The awareness campaign can be unfolded in two steps: creativity and media.

Firstly, regarding the **creativity of the awareness campaign**:

- *12 posters.* They will be created to correspond to the 12 months of the year (see **Figure 5**). The first is a poster with the image of the APCC athlete with the greatest sporting success, both nationally and internationally, with the benefits he has achieved with his sports practice. The other 11 are images of the various sports practiced in the APCC, each one with a benefit.

- *2 events.* In addition, the company intends to reinforce the awareness campaign by holding two events during the year, one with the tricycle, the other with bocce. The

objective is to invite families and their children to come and experience a new modality. They will be held during school holidays so that children can have availability.

Secondly, regarding the **media planning of the awareness campaign**, the 12 created posters will be shared in three ways (the first to give an overall picture of our goal and the others will be posted 1 per month):

- The 12 posters will be posted in doctors' and therapists' offices (**Figure 5**).
- The 12 posters will be sent to schools (**Figure 5**).
- The 12 posters will be posted on APCC's social networks (one per month), (**Figure 5**).
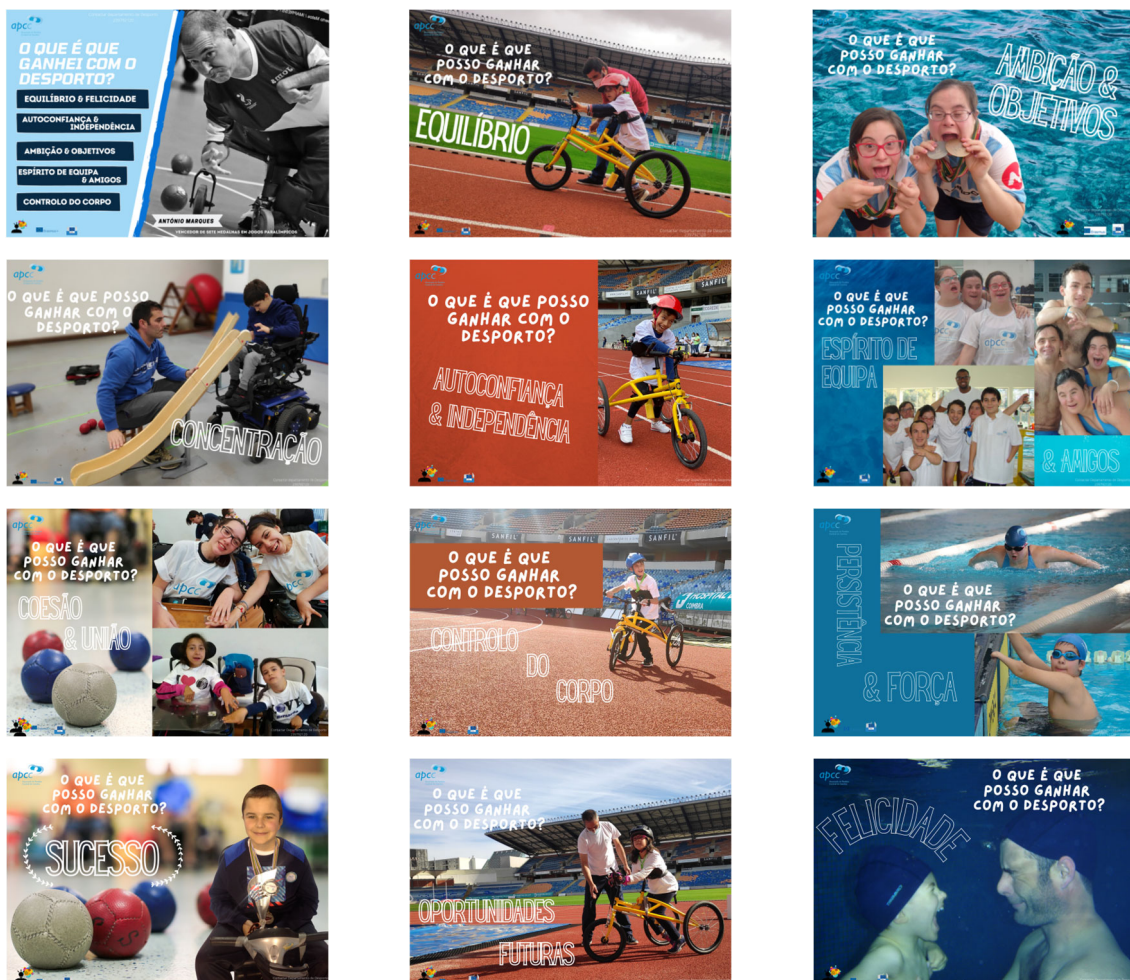
Figure 5. **Twelve posters for the awareness communication campaign**

Source: Anabela Marto.

The two events will be published by:

- The two event-posters will be posted and publicized on the social networks of the APCC (**Table 3** and **Table 7**).
- The two event-posters will be distributed to schools (**Table 18** and **Figure 6**).
- A press release will be made publicizing the action the week before the event (July 14th for the tricycle and December 14th for bocce). This press release will be shared using the following city's media: Diário de Coimbra and Diário das Beiras), (**Figure 9** and **Figure 13**).
- Additionally, a survey will be made to identify schools in the Municipality of Coimbra that have children with a profile for our activities. Then, physical education teachers will be invited to participate in the two events and invite their students.

```
Mr/Mrs director

The Coimbra Cerebral Palsy Association (APCC) will carry
out, on December 21st, at 2:00 pm (at the Coimbra Cerebral
Palsy Rehabilitation Center), the event "Sports Doesn't
Know Limits", in which about 10 children and teenagers
will be able to have a first contact with boccia.

It is one of the most traditional forms of adapted sport
in Portugal, which can be played individually, in pairs
or teams, and is practiced both in terms of competition
and recreation.

With this event, APCC intends to identify potential new
athletes, as well as recruit volunteers who can, in the
future, accompany practitioners and thus contribute to
the boccia development.

In this sense, we appreciate the dissemination of this
message in your school among the group of physical edu-
cation teachers, as we believe it may be of their inter-
est.

Attached is the event publicity poster. We would like it
if possible to be posted in the teachers' office.
```

Figure 6. Email to attract schools/physical education teachers for event 1

Figure 7. Flyer that will be used to announce event 1 focused on frame running

Source: Anabela Marto.

FRAME RUNNING EVENT - Responsible: Ana Nunes

Day: 23 July 2022

Location: Coimbra Municipal Stadium

Hours: 10am-12pm

- ❖ **10:00 am:** Prof. Ana Nunes welcomes and introduces the frame running and the sport.
- ❖ **10:30-11:30 am:** With the help of Ana Nunes, EmílioConceição and AnabelaMarto, António Costa e Rosa Marques all children will have the opportunity to try the frame running, see what adaptations are necessary and make a 100m route.
- ❖ **11:30 am**: Questions and farewells

Figure 8. Schedule of the event 1 (Frame running)

Source: Anabela Marto.

FRAME RUNNING EVENT - Responsible: Ana Nunes

APCC WILL PROVIDE CHILDREN WITH DISABILITIES THEIR FIRST EXPERIENCE WITH FRAME RUNNING

A group of about --- children and young people will experience for the first time the sensations of running on a frame running, in an initiative promoted by the Association of Cerebral Palsy of Coimbra (APCC). It will be during the event "O Desporto Não conhece Limites", which will take place on the 23rd of July, from 10:00 am, on the athletics track of Estádio Cidade de Coimbra.

The frame running is the name of the vehicle, but also of a discipline in which practitioners run with their feet, sitting on equipment with three wheels and three supports. It is aimed at people with cerebral palsy and motor impairments that affect movement or balance, who move in a wheelchair or who do not have a functional foot run.

It is a sport whose practice brings benefits at a motor, psychological and social level, being also very fun, particularly for the little ones.

It is in this sense that the event "Sports Doesn't Know Limits" intends, in addition to providing moments of socializing and fun, also to identify potential new athletes, as well as volunteers who can, in the future, accompany practitioners of the sport and contribute, thus, for its development.

This initiative takes place within the scope of the European project "SIM – Social Inclusion Marketing", funded by the Erasmus+ programme, which also provides for a similar event dedicated to the bocce modality.

Figure 9. Press Release for the event 1

Source: Anabela Marto.

```
Mr/Mrs Director

The Coimbra Cerebral Palsy Association (APCC) will carry
out, on July the 23rd, at 10:00am (at the Coimbra munic-
ipal stadium), the event " Sports doesn't know Limits" in
which about 12 children and teenagers will be able to have
a first contact with the frame running.

Frame running is the name of the vehicle, but also an
adapted sports discipline in development in Portugal.

With this event, APCC intends to identify potential new
athletes, as well as recruit volunteers who can, in the
future, accompany practitioners and thus contribute to
the development of frame running.

In this sense, we appreciate the dissemination of this
message in your school among the group of physical edu-
cation teachers, as we believe it may be of their inter-
est.

Attached is the event publicity poster. We would like it
if possible to be posted in the teachers' office.
```

Figure 10. Email to attract schools/physical education teachers for even 2

Figure 11. Flyer that will be used to announce event 2 focused on Boccie

Source: Anabela Marto.

BOCCIE EVENT — Responsible: Anabela Marto

Day: December 21, 2022

Location: Cerebral Palsy Rehabilitation Center of Coimbra

Hours: 2-5:30 pm

- ❖ **14 pm:** Anabela Marto welcomes everyone. It presents the modality with a brief summary of how to play.
- ❖ **14:30 pm:** 2 federated athletes (António Marques who plays with his hand and Mariana Silva who plays with a ramp) do a set to exemplify.
- ❖ **15-16 pm:** The children's group is divided into 2 groups of 5 and each group will try out the best way to launch. Group 1 is under the responsibility of Anabela Marto and group 2 with Emílio Conceição. Two sets will be used.
- ❖ **17 pm:** Mini boccie tournament. Three teams will be formed and each team will have 1 child, 1 parent and 1 volunteer. All against all and only three partials.
- ❖ **17:00-17:30 pm:** Questions and goodbyes.

Figure 12. Schedule of the event 2 (Boccia Event)

Source: Anabela Marto.

FRAME RUNNING EVENT - Responsible: Anabela Marto
APCC MAKES YOU KNOW ONE OF THE MOST IMPORTANT ADAPTED SPORTS
Boccie is one of the most important adapted sports in Portugal, with several medals won in Paralympic Games and World and European Championships, and the Coimbra Cerebral Palsy Association (APCC) intends to show young people all their history and emotionality.
Thus, on December 21st, from 2 pm, at the Cerebral Palsy Rehabilitation Center in Coimbra, the event "O DesportoNãoConheceLimites" will take place, in which about --- children and adolescents will be able to have a first contact with the sport, with the support of the coaches of the Sports and Physical Education Department of the institution to get to know its fundamentals and rules.
Among other athletes, the renowned António Marques will be present, who won seven medals in boccie in the Paralympic Games alone – in addition to many more in other international and national competitions – who will report his own experience, and all the positive things that sport has brought to his life.
Boccie can be played individually, in pairs or in teams, with the aim of the game being to place more balls closer to the target ball than the opponent's. At the APCC, the competition aspect (with several athletes representing the Association in national and regional competitions) is reconciled with the promotion of Bocciateca (the first resource center for the sport in the country, aimed at the promotion of senior boccie).
The event "Sports Doesn't Know Limits" aims, in addition to providing moments of conviviality and fun, also to identify potential new athletes, as well as volunteers who can, in the future, accompany practitioners of the sport and contribute, in this way, to for its development.
This initiative is the second of its kind to take place within the scope of the European project "SIM – Social Inclusion Marketing", funded by the Erasmus+ programme, which also foresees the holding of a similar event dedicated to the boccie modality. The first one was dedicated to the tricycle and took place last July.

Figure 13. Press Release for the event 2

Source: Anabela Marto.

c.   Responsible for the action

The following tables show the person in charge of each action; contains de names of the specialists/places where the posters of the "awareness campaign" will be placed, and includes the name of the places where the posters of the "attraction events" are going to be allocated.

Table 17. Responsible for the action

Action	Responsible
Posters posted in doctors' and therapists' offices	Cristina Anastásio
Posters sent to schools	José Lopes
Posters shared in Social Networks	Pedro Santos- Responsible for the communication department of APCC The Facebook pages of both APCC and sports will be the means of publicizing our campaign Facebook/apccdesporto - currently has 1,100 followers Facebook/APCCoimbra currently has 15,000 followers
Event 1: diffusion and content	Ana Nunes
Event 2: diffusion and content	Anabela Marto

Table 18. Names/places where posters will be placed

Name	Specialty
A.S	Pediatric neurologist office
O.M	Pediatric neurologist office
A.R	Orthopedist office
F.T	Neurologist office
Gym physiotherapy	
Gym occupational therapy	
Schools from Coimbra	• Escola Básica e Secundária Quinta das Flores • Instituto Educativo de Souselas • Escola secundária Jaime Cortesão • Escola secundária Avelar Brotero • Escola Secundária D.Dinis • Escola secundária D.Duarte • Escola Básica da Solum • Escola Secundária da Infanta D. Maria

Table 19. **Name of the places where the posters of the event are going to be collocated**

APCC Facebook

APCC volunteers Facebook

APCC sports Facebook

APCC vans (20)

List of schools:

• Escola Básica e Secundária Quinta das Flores

• Instituto Educativo de Souselas

• Escola secundária Jaime Cortesão

• Escola secundária Avelar Brotero

• Escola Secundária D.Dinis

• Escola secundária D.Duarte

• Escola Básica da Solum

• Escola Secundária da Infanta D.

d.   Timetable action

The following tables show the timetable of each action: posters shared on Social Networks; Posters posted in doctors' and therapists' offices, Posters sent to schools, event 1 diffusion and event 2 diffusion.

Table 20. **Posters shared in Social Networks: first week of every month**

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
6	4	7	6	3	6	4	2	7	4	1	1

Table 21. **Posters posted in doctors' and therapists' offices: 2 days after Social networks**

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
8	6	9	8	5	8	6	4	9	6	3	3

Table 22. Posters sent to schools by poste one day before the share in social network

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
7	5	8	7	School holidays	7 (2 posters)	4	3	7	3	2	2

Table 23. Event 1 diffusion: day to paste the layers announcing event 1

June 2022	*July 2022*
From 27th of June Put the posters on the APCC vans 3 in 3 days on social network	Event day 23

Table 24. Event 2 diffusion: day to paste the layers announcing event 2

November 2022	*December 2022*
From 28 of November Put the posters on the APCC vans 3 in 3 days on social network	Event day 21

e. Budget

Table 25 shows the total amount needed to developed the awareness communication campaign.

Table 25. Budget to carry on action 1

Concept	*Amount of money need*
Posters posted in doctors' and therapists' offices	12x6x6.12€=440.64€
Posters sent to schools	12x 6x 6.12€=440.64€
Event 1: • Diffusion and content • Catering water and snacks • Gifts • Material transport to the stadium	6.12x28=171.36€ 0.84€x60=50.4€; 3,5€x40=140 2.99x40=119.6€ 10kmx0.36€=3.6€

Table 25 (cont.). Budget to carry on action 1

Event 2:	
• Diffusion and content • Catering water and snacks • Gifts	6.12x28=171.36€ 0.84€x60=50.4€; 3,5€x40=140 2.99x40=119.6€
Total	**1,724.4 €**

Action 2: Attraction campaign focused on volunteers

a. Target audience

Faced with the difficulty in getting parents to be present in the activities, the idea was to find a group of volunteers who could be responsible for monitoring young people both in training and in competition. Therefore, this attraction campaign aims to recruit volunteers to APPC.

b. Content of the campaign and media planning

The objective of the attraction campaign is to recruit possible volunteers that can collaborate with the organization in accompanying children during training and eventual competitions. This would facilitate collaboration with families who have little availability to do so.

So, in collaboration with the APCC volunteer office:

1. The two events (previously reported) will also be announced on the Facebook of the volunteer office so that anyone who wants to come participate in the activities.

2. A flyer has been created to attract volunteers (**Figure 14**).

    A. This flyer will be printed so that it can be distributed at volunteer fairs (National Volunteer day, international volunteer day) (**Table 26 and Table 27**).

    B. This flyer is also going to be shared on the three APCC social networks:

        i.   facebook/apccdesporto - currently has 1,100 followers

        ii.   facebook/APCCoimbra currently has 15,000 followers

        iii.   facebbok/VoluntariadoAPCCoimbra currently has 1130 followers

3. An email will be sent with the request for publicizing the events to the volunteer centers of the various faculties of Coimbra (**Figure 15** and **Table 28**). This email list is already part of the mail list of our APCC volunteer office. This email, the event poster

and the flyer will be sent so that it can also be shared on the social networks of the volunteer centers.

Figure 14. Flyer that will be used to attract volunteers

Source: Anabela Marto.

Table 26. List of places/fairs to spread the flayer

List of places
APCC - APCC volunteer office
Fair of national volunteer day
Fair international volunteer day
facebook/APCCoimbra
facebbok/VoluntariadoAPCCoimbra
facebook/apccdesporto

Event 1

The Coimbra Cerebral Palsy Association (APCC) will carry out, on December 21st, at 2:00 pm (at the Coimbra Cerebral Palsy Rehabilitation Center), the event "Sports Doesn't Know Limits", in which about 10 children and teenagers will be able to have a first contact with boccie.

It is one of the most traditional forms of adapted sport in Portugal, which can be played individually, in pairs or teams, and is practiced both in terms of competition and recreation.

With this event, APCC intends to identify potential new athletes, as well as recruit volunteers who can, in the future, accompany practitioners and thus contribute to the boccie development.

In fact, for the development of this sport in our association, it is essential to find people who voluntarily make themselves available to help these athletes individually, either in training or in competition.

In this sense, we come to request the disclosure of our event through your contacts.

Attached is the event publicity poster.

Event 2

The Coimbra Cerebral Palsy Association (APCC) will carry out, on July the 23rd, at 10:00am (at the Coimbra municipal stadium), the event " Sports doesn't know Limits" in which about 12 children and teenagers will be able to have a first contact with the frame running.

Frame running is the name of the vehicle, but also an adapted sports discipline in development in Portugal.

With this event, APCC intends to identify potential new athletes, as well as recruit volunteers who can, in the future, accompany practitioners and thus contribute to the development of frame running.

In fact, for the development of this sport in our association, it is essential to find people who voluntarily make themselves available to help these athletes individually, either in training or in competition.

In this sense, we come to request the disclosure of our event through your contacts.

Attached is the event publicity poster.

Figure 15. **Email that will be used to attract volunteers in Universities**

Table 27. List of contacts to share the mail to attack volunteers

List of contacts	
Desconstroi-Te | Núcleo de Estudantes Medicina xxx@nemaac.net V de Voluntariado | Núcleo de Estudantes Economia xxxx@gmail.com xxx@gmail.com xxx@academica.pt Sorriso Aberto - Faculdade de Psicologia Pelouro de Intervenção Cívica e Ação Social xxx@gmail.com xxx@gmail.com	Biólogia xxx@gmail.com Farmácia Intervenção Civica e Social xxx@nefaac.pt ANEM xxx@anem.pt

c.   Responsible of the action

APCC volunteer office - Kim Almeida.

Table 28. Responsible of the action

Action	*Responsible*
Distribution of the flyer in fairs and different places	Kim Almeida/Anabela Marto
Posts shared in facebook/apccdesporto	Pedro Santos
Posts shared in facebook/APCCoimbra	Pedro santos
Posts shared in facebbok/Voluntariado APCCoimbra	Kim Almeida
E-mail to Universities and other institutions	Kim Almeida

d.   Timetable action

Table 29. Distribution of the flyer in fairs and different places

Days to share the flyers physically

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
3	6	8	12	16	23	24	27	15	29	3	7

Table 30. Posters, flyers shared in Social Networks

Days to share the flyers once in a month virtually

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
6	4	7	6	3	6	4	2	7	4	1	1

Table 31. Email send to our contacts

April 2022	
May 2022	Send email inviting for the event 1
June 2022	From 27th of June3 in 3 days Posters event 1 on Facebook
July 2022	Event on the 21st
August 2022	
September 2022	Nacional volunteer day26th
October 2022	Send the email inviting for the event 2
November 2022	From 28 of November 3 in 3 days Posters Event 2 on Facebook
December 2022	International volunteer day 5th Event on the 23rd
January 2023	
February 2023	
March 2023	

e. Budget

Concept	*Amount of money need*
Print flyers	19.04 €
Visiting the fairs/places to share the flyers	200.00 €
Total	**219.04 €**

5. EXPECTED RESULTS: USEFULNESS OF THE PROPOSAL

5.1. PARENTS COMPETENCES

- Motivation to enroll their child in a sports activity
- Deeper knowledge of adapted sports and their benefits for people with disability
- Encourage a favorable attitude towards self-learning

5.2. VOLUNTEERS COMPETENCES

- Higher involvement in the disability framework
- Acquire knowledge about adapted sport
- Acquire knowledge about motor disabilities
- Empathy with athletes
- Learning to work in a team based on assertiveness
- Encourage a favorable attitude towards self-learning

6. EVALUATION

Awareness campaign focused on parents and doctors/physical therapists/teachers

The effectiveness will be measured using these indicators:

- Number of children participating in events.
- Number of information requests.
- Number of comments on social networks.

Attraction campaign focused on volunteers

Its effectiveness will be measured using these indicators:

- Number of volunteers participating in events.
- Number of comments/questions posed on social media.

5.4. Good practices: Encouraging informal caregivers to acquire professional qualification

How the informal caregivers who provide palliative care services to their relatives in the home environment can be encouraged to acquire professional qualification?

Koen Bergmans

NARHU. - National Association Of Professionals Working With People With Disabilities

Mini Case Contents:

1. **Brief description of the organization**
2. **Problem presentation**
3. **Traditional solution**
4. **SIM solution: Strategic and Operational approach**
    4.1. STRATEGIC APPROACH: Social marketing Benchmark
    4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem
    4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?
5. **Expected results: Usefulness of the proposal**
6. **Evaluation**

How the informal caregivers who provide palliative care services to their relatives in the home environment can be encouraged to acquire professional qualification?

1. BRIEF DESCRIPTION OF THE ORGANIZATION

NARHU (National association of professionals working with people with disabilities) is established in Plovdiv, the 2nd largest city in Bulgaria and has been operating for more than 20 years both on national and European level. NARHU is a non-profit umbrella association, registered in public benefit, which acts as a national representative body of different types of professionals who are working with people with disabilities in the domains of education, employment and social inclusion. "Health care" department within NARHU is working to ensure that people with disabilities enjoy similar quality of life as other citizens and have access to good quality services in health promotion and health care. Some of the services such as healthy nutrition counselling, health promotion, provision of assistive technologies and tools and others are provided in the premises of NARHU, while other services like rehabilitation, end-life and palliative care services are externally provided by our member's organizations. All professionals working in the department are following continuous vocational training to improve their skills and qualifications. To achieve this, NARHU is collaborating with universities and VET training providers all over the Europe. Mobility programs for exchange of knowledge and good practices are organised every year and usually involves professionals from different European countries.

2. PROBLEM PRESENTATION

The majority of the informal caregivers in Bulgaria who care for their relatives in the home environment do not have any qualification in the field of end-life and palliative care. On the other hand the palliative care services in private hospices are unaffordable for the majority of elderly population. Public hospices have long waiting lists and the vacancies for the patients are very limited. Due to these reasons the informal caregivers who are often patients` relatives take the responsibility to perform basic medical procedures without adequate preparation. The informal caregivers are still reluctant to attend training courses, although such courses do exist and are even offered for free within European funded projects and local initiatives.

The problem is how the informal caregivers who provide palliative care services to their relatives in the home environment can be encouraged to acquire professional qualification.

3. TRADITIONAL SOLUTION

Video lessons are usually prepared and access to online repository is given, containing training materials in the field of end-life and palliative care. Thus, when informal caregivers have spare time, which they can dedicate to self-learning or they lack knowledge on particular topic, they can access the training resources and benefit from them.

4. SIM SOLUTION: STRATEGIC AND OPERATIONAL APPROACH

4.1. STRATEGIC APPROACH: Social marketing Benchmark

The company would like that more informal palliative caregivers are provided with higher professional qualification because it is an emotionally difficult and sensitive sector that requires professionalism.

Besides the research, it is very important to do a strategic approach to the solution, through a study of the 8 benchmark criteria (**Table 32**).

Table 32. Eight benchmark criteria

1. Consumer orientation	Qualitative research about the informal caregivers has been processed. Different tools have been used: Survey; Interviews and Focus groups. • **Survey: the organization has done a short survey among informal caregivers with questions like:** *What did you expect from being a palliative caregiver in a home environment?* *Do you think you have obtained sufficient support and training to become a palliative caregiver?* *Do you know people in need of palliative care?* *Would you participate in courses and sessions about palliative care?* • **Interviews with stakeholders and target audiences**. • **Focus groups with stakeholders and target audiences**.
2. Behavior	• **Actual**: informal caregivers who are often patients` relatives take the responsibility to perform basic medical procedures without adequate preparation. • **Desired**: informal palliative caregivers are provided with higher professional qualification.
3. Theory	Social Norm Theory – they can meet and learn from/with peers and exchange experiences. Exchange Theory – to make target audience understand that there are professional and probably easier ways of handling situations in palliative care.
4. Insight	• There is a lack of self-esteem due to the lack of qualitative professionals providing training and/or support. • There are no services or cash benefits for informal care givers in Bulgaria. • They don't receive monthly money from any organization or government institution to be the informal caregivers at family environment. • They could have someone to replace them but they should hire a private company or telecare and even there, they do not promise quality of care giving due to a lack of professionals.

Table 32 *(cont.).* **Eight benchmark criteria**

5. **Exchange**	**Benefits** for the target audience if they acquire the desired behavior: socializing; acquiring professional qualification; new skills. **Barriers** in front of the target audience in order to acquire the desired behavior: lack of time, believe they know well how it should be done, lack of motivation, domestic violence problems.	
6. **Competition**	Informal caregivers lack of motivation	
7. **Segmentation**	• Informal caregivers. • Professional caregivers.	
8. **Method Mix: 6 Ps**	• What is your product? – *events about informing and educating informal caregivers in the palliative care sector.* • Where is the place of your campaign/behavior? *This can be anywhere in Bulgaria, it can be given by one of the stakeholders (a hospital, VET Centre, the municipality could offer a conference hall).* • What is the price? – *financial resources ; time of the caregivers.* • Who are the partners? - *the partners are the stakeholders (see* **Table 33** *for the list of stakeholders).* • What are the favorable (or not) policies? – *We would do research about policies.* • How are you going to promote your campaign/project? *Facebook events popularizing the initiatives, flyers, TV reportage/interviews with participants.*	

Table 33 shows the stakeholders involved.

Table 33. Stakeholders involved

Stakeholders	Interest in the activity	Likely impact	Communication with them
Professional caregivers	High Interest – all caregivers in the palliative sector could attend these activities if possible in their schedule	High impact	Email, Meetings, Personal communication…
NGOs working with informal and professional caregivers / or palliative care	NGOs working with professional and informal caregivers would have a high interest - they could organize such events / attend or/and present their own projects and maybe enroll them in one of the provided courses	High impact	Email, Meetings, Personal communication…
Medical staff from the palliative care sector	Medical staff would have a high impact due to their professional knowledge that they could share and teach the informal caregivers.	High impact	Email, Meetings, Personal communication…
Local municipalities	Local municipalities would have a medium interest - they could provide a free space where the event can take place and might also have an interest due to political reasons in Bulgaria	Small Impact	Email, Meetings, Personal communication…

4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

According to the formative research results, two campaigns should be implemented, with the objective to encourage informal caregivers, who provide palliative care services to their relatives in the home environment, to acquire professional qualifications.

1. Awareness campaign for informal caregivers

In an awareness campaign, some measures are directly aimed at changing the personal behavior of caregivers, and others are aimed at raising awareness of the benefits of continuing healthcare education. Therefore, to increase the knowledge, ownership and awareness of informal caregivers about the different problems, a good awareness strategy has to be designed. In addition, innovative tools have to be introduced in the courses that positively motivate informal caregivers to attend them, and improve their technical knowledge about palliative care. The core message of an awareness campaign is "to take care of your relatives, you must also take care of yourself" and this should be communicated to the target audience through various media.

Several possible actions could be appropriate, in order to improve the informal caregivers awareness:

- **Action 1:** special image or brand should be created that identifies the need to acquire professional qualification using emotional and sensitive message;

- **Action 2:** social media campaign to inform the need not only to take care of others, but also taking care of themselves, through the acquisition of professional know-how;

- **Action 3:** outdoor media campaigns through flyers to post in hospitals, municipalities, and billboards;

- **Action 4:** training program in addition to the medical training contents. Company should include psychological training contents to alleviate the lack of self-esteem and to counteract situations of violence. The contents should be divided into modules;

- **Action 5:** reward system. If you finish the first module, you will be able to access 5 free therapy sessions with a psychologist.

2. Commitment to social and professional support for caregivers

Despite the existence of formal professional support services, informal support (mainly family members) remains the main source of care for the disabled. Health professionals are

the ideal choice to educate, provide psychological support and help mobilize the social resources available to the informal caregiver (Rosell et al, 2014).

The effectiveness of multiple interventions, the adoption of a holistic approach for both patient and caregiver, and the optimal utilization of available community resources have been demonstrated (Vahabi et al., 2022). A variety of intervention strategies could be applied, including individualized caregiver interviewing aimed at providing relevant information, educating and modifying cognitive skills to cope with stressors and how they are perceived; family interviewing to address the caregiver's environment; and group sessions for caregivers that focus on affective considerations and the caregiver's emotional response (Rosell et al, 2014).

Several possible actions could be appropriate, in order to improve the informal caregivers awareness:

- **Action 1:** Using the same brand and communications media as in the awareness strategy;

- **Action 2:** Creation of events for meetings between professionals and informal caregivers;

- **Action 3:** Improving by updating the online repository to avoid misinformation that informal caregivers can find on the Internet;

- **Action 4:** Creation of a virtual community of support to share problems, moods, and online socializing moderated by a therapist specialized in this type of patients.

This organization has implemented a new strategy focused on the family system and on the care of both the caregiver and the disabled patient, providing more comprehensive support and better planning through the training system.

4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

The aim is to encourage informal caregivers who provide palliative care services to their relatives in the home environment to acquire a professional qualification. Research has been conducted on the training of informal caregivers in palliative care in Bulgaria. The most important underlying reasons causing absences and lack of attendance and attention in the qualification courses are lack of time, domestic violence and lack of self-esteem. After segmentation and targeting, two segments have been selected: informal caregivers and professional caregivers.

Table 34. Informal carers as a % of total population, EQLS 2016

Country	Total	Male	Female	18-34	35-64	65+
Czech Republic	9%	9%	9%	6%	11%	9%
France	16%	13%	18%	11%	18%	14%
Germany	23%	20%	26%	12%	28%	24%
Netherlands	18%	13%	23%	10%	23%	17%
Spain	16%	13%	19%	14%	19%	11%
Sweden	12%	10%	15%	12%	14%	10%
United Kingdom	19%	16%	22%	18%	20%	19%
Austria	10%	8%	12%	4%	11%	15%
Belgium	30%	23%	36%	25%	33%	30%
Bulgaria	10%	8%	12%	8%	12%	8%
Croatia	16%	13%	18%	14%	19%	11%

Source: EQLS 2016, adapted table from overview report (Eurofound 2018, forthcoming).

In light of the research results, two strategies have been selected in order to:

- Making the desired behavior more attractive;
- Increasing the benefits of the desired behavior;
- Decreasing the barriers to the desired behavior.

1. Awareness campaign for caregivers

a. Target audience

Professional caregivers and informal caregivers.

b. Objectives: "make the caregivers more aware"

- Communication of why the course to acquire professional skills to provide palliative care services is a positive point towards more professionalism for informal caregivers.
- Communication to inform the informal caregivers about this course.

c. The Budget is funded by European Funds.

d. Actions

- Customize branding to fairly identify vocational training. The organization should create a training brand that identifies the need to acquire a professional qualification using emotional and sensitive messaging;

- Social media campaign to inform about the need to not only take care of relatives but also to take care of themselves, through acquiring professional qualifications:

  o Facebook page has been created and people are started to being reached. Also, the first event been planned on the 21/03/2022.

The name : нг = Informal Care

Color explanation: NARHU department states that all colors in the picture are warm and eye-catching

  o An event was hosted, in which informal caregivers caring for elderly with dementia participated, and the main topics discussed were how to support the person in the periods of cognitive decline and tips about what the carer could do in the day-to-day living of the people with dementia.

  o Outdoor media campaigns for which flyers should be designed and posted in hospitals, municipalities and billboards:

    ▪ Flyer and online flyer have been created and disseminated
    ▪ Outdoor activities were planned to take place on 12th of May, 24th of June, 23rd of July, 19th of September.

- Improving Training program: in addition to the medical training contents, **psychological training contents** was planned to be included to alleviate the lack of self-esteem and to counteract situations of violence. The contents was divided into modules (**Table 35**).

Table 35. Training content proposed

1. Self-regulation and self-control	• To support learners in obtaining specialized knowledge about dimensions and manifestations of self-regulation and self-control. • To help learners to realize the importance of self-regulation while executing their daily tasks and responsibilities, thus improving the overall quality of life of both parties – carer and the user/relative. • To offer to the learner's tips for achieving better self-regulation, which are easy to be applied in an ordinary setting. • To make the learners aware of the nature and spectrum of the human emotions, as well as to equip them with self-oriented strategies to manage their emotions. • To help the learners to control their behavior, so that they can self-improve their mental health.
2. Communication skills	• To make the learner familiar with the main types of communication and their use in the daily work of the carers. • To describe interpersonal and intrapersonal communication from the perspective of its application in the daily work of the carers. • To present to the learners alternative means of communication which augment the usual interaction between the carer and the patient. • To help learners to exercise their abilities to communicate efficiently in different settings
3. Coping strategies to overcome stress & fatigue	• To determine the causes of fatigue and stress • To identify how caregivers cope with stress and fatigue • To explain the effect of exercise and physical activity on reducing stress and fatigue • To develop physical activity and exercise strategies related to stress and fatigue

Table 35 *(cont.).* Training content proposed

4. **Resilience**	• **To give information about resilience** • **To raise awareness about resilience** • **To introduce the types of the resilience** • **How to train about resilience**
5. **Coping strategies to overcome grief & loss**	• To be able to recognize the grief and loos • To make the learners know about the symptoms of grief and loss • To give information to the learners about the coping strategies about grief

o A reward system was implemented: if participants of the course would finish the first module, they would be able to access five free therapy sessions with a psychologist.

o For every module a flyer was designed offering free try-out sessions of several psychotherapeutic approaches after completing the first module.

e. Timetable for actions.

Table 36 shows the timetable for all the actions: Social media campaign; Outdoors media campaign; training schedule. ....

Table 36. Timetable for 1 year

April 2022	May 2022	June 2022	July 2022	August 2022	Sept. 2022	October 2022	Nov. 2022	Dec. 2022	Jan. 2023	Feb. 2023	March 2023
6	4	7	6	3	6	4	2	7	4	1	1

2. Commitment to social and professional support for caregivers

a. Target audience.

For all caregivers.

b. Objective.

- To incentivize caregivers who do a good quality job.
- Reach a professional development.
- Increase the popularity of caregiver.
- Reach interactions and support.

c. Actions.

- Organizing events for meetings between professionals and informal caregivers. People would be reached through flyers and the Facebook page. The meetings would run from march 2022 to august 2022, one time a month, for a duration of 6 hours.

March 21	April 21	May 20	June 21	July 21	August 22
First meeting event	First training event	Second training event	Third training event	Forth training event	Final event

- Improve and update the online repository to avoid misinformation that informal caregivers may find on the Internet.

  The initiative and the good practices were promoted in the online repository of Eurocarrers during our events and trainings.
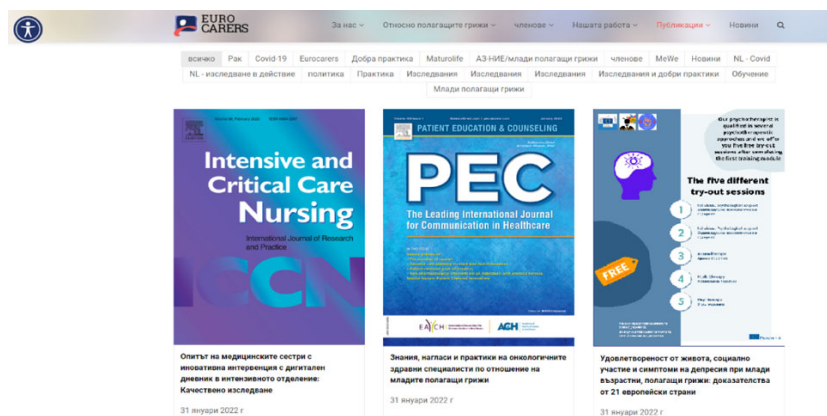
- Creation of a virtual community of support to share problems, moods, and online socializing moderated by a psychotherapist specialized in this type of patients.

  There has been a first Zoom meeting for support with our specialized therapist. There were 10 participants.

The funding is provided by the European Commission.

5. EXPECTED RESULTS: USEFULNESS OF THE PROPOSAL

5.1. INSTRUCTOR-EDUCATORS' COMPETENCES

- Ability to transfer your knowledge and skills to the other people who are less experienced and qualified.
- Promoting your professional knowledge and medical office.

5.2. USERS COMPETENCES

- Improved quality of the services provided to people who are in need of informal care (palliative and end of life care).
- Improved mental health of the informal caregivers.

6. EVALUATION

Action 1. Awareness campaign for caregivers

Its effectiveness will be measured using these indicators:

- Number of caregivers participating in the training program;
- Number of caregivers reached through social networks;
- Number of like or comments on social networks;
- Numbers of caregivers awarded 5 sessions with therapist.

Action 2. Commitment to social and professional support for caregivers

Its effectiveness will be measured using these indicators:

- Number of professional caregivers participating in updating the online repository;
- Number of comments/questions posed on social media;
- Numbers of professional and informal caregivers participating in virtual community.

Special evaluation: Training course results

In order to evaluate the results, multiple questionnaires have been created:

- Self-assessment approach where participants are invited to check their knowledge and skills through multiple choice questionnaires;
- Questionnaires with open questions and cases to assess their competences.

<u>Example of questions:</u>

1. How does science NOT measure motivation?
    a. Through behavior
    b. <u>Through life goals</u>
    c. Through level of engagement
    d. Through neural activation

2. According to Maslow's Hierarchy of needs (1971), what is considered a "higher value"?
    a. The need to belong and be recognized
    b. The need for sleep and eat
    c. <u>The need for spiritual and psychological fulfilment</u>
    d. The need for family and friends

3. Which of the following is NOT a suitable way to increase our motivation?
    a. Develop competencies
    b. <u>Be critical of ourselves</u>
    c. Be creative
    d. Develop talents

4. Intrinsic motivation can derive from:
    a. <u>Curiosity and desire to know</u>
    b. Self-control and ability to be flexible

     c.   Financial stability and material well-being

     d.   Workplace achievements

5.   According to SDT (self-determination theory), we are driven to realize our:

     a.   <u>Potential</u>

     b.   Material goals

     c.   Desire to extend our social network

     d.   Control over circumstances

6.   The three basic needs are:

     a.   <u>Relatedness, autonomy, competence</u>

     b.   Autonomy, perseverance, well-being

     c.   Competence, open-mindedness, self-esteem

     d.   Relatedness, social acceptance, positive image

7.   Which of the following could NOT be a motivational factor for the promotion of trust in a caregiver?

     a.   Appreciation and rewards at the workplace

     b.   Open communication and feedback

     c.   <u>Unsupportive work environment and lack of team work</u>

     d.   Job security and clear decision-making practices

8.   What are the types of motivation? Provide examples.

9.   What is described by the following definition "a willingness to abandon self-resentment in the face of one's acknowledged being wrong, but rather fostering compassion, generosity, and love toward oneself"? <u>Self-forgiveness</u>

10.   You observe your caregiver colleague begin to lose their motivation to provide high quality care. What would you advise them to do for themselves?

6. INNOVATIVE GOOD PRACTICE: MEASUREMENT AND IMPACTS

6.1. Innovative good practice: measurement and impacts

Impact assessment of a self-management program using the theory of change

José Gil and María Sorzano
IVASS

Mini Case Contents:

1. **Brief description of the organization**
2. **Problem presentation**
3. **Traditional solution**
4. **SIM solution: Strategic and Operational approach**
    4.1. STRATEGIC APPROACH: Social marketing Benchmark
    4.2. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem
    4.3. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

Impact assessment of a self-management program using the theory of change

1. BRIEF DESCRIPTION OF THE ORGANIZATION

Valencian Institute of Social and Health Care Services (IVASS) is a public organization attached to the Valencian Regional Ministry of Equality and Inclusive policies and its mission is to offer individual support to people with intellectual disabilities in order to improve their quality of life. IVASS has presence in the three provinces of Valencia Region (Valencia, Alicante and Castellón).

More than 1040 workers, 1090 persons with intellectual disabilities (PWID) and their legal representatives, and 105 volunteers create the IVASS' "family". The 1090 people with intellectual disabilities (PWID) are the core and the reason for IVASS to exist.

IVASS spends many of its resources offering any kind of support to improve its quality of life. 850 IVASS educators are the front-line professionals whose most important task is to offer PWID the basic care and non-formal education through the development of different educational, health, vocational and social intervention programs.

IVASS educators work within the context of many types of facilities and resources: 8 residences, 1 elderly day center, 9 occupational centers, 2 day centers, 5 sheltered houses, 1 damage brain center, 1 mental health facility, 2 training centers and 1 special employment center. These resources allow IVASS to offer almost all of the supports that PWID –or other disadvantaged persons- need in their daily-life activities such as sports activities, leisure time activities, employment mediation, vocational training, competences improvement programs, physiotherapy, summer vacations, health services, etc.

2. PROBLEM PRESENTATION: HOW TO ASSESSMENT EFFECTIVENESS OF A DISABILITY PROGRAM

IVASS wants to achieve the equal opportunities for all PWID, not only those PWID attending regularly our facilities. For this reason, IVASS, as a public service, also offers external support services to many disability organizations (sports events, pedagogical materials, summer vacations, training, etc.).

This case study describes how the assessment effectiveness of a disability educational initiative (self-management programs) might be improved by using a conceptual framework commonly used in the social marketing field (Theory of Change).

3. TRADITIONAL SOLUTION: NON-SYSTEMATIC GATHER OF INFORMATION

The development of assessment competences needs time, resources and iteration. Professionals in charge of the impact assessment must have leadership and technical abilities, master some research techniques, understand the stakeholders approach, and possess know-how to apply theory into practice.

The traditional assessment of the impact of social projects consists on a non-systematic gathering of information, and more closed to the monitoring of the progress of the dissemination activities rather than the measurement of the impact of the interventions. Usually, the collection of information is done at the end of the project, isolated to the rest of the activities, and not taking into account the stakeholders opinion.

Moreover, the concept of impact, the long-term changes that the project will have in the organization, beneficiaries and community overall, can be misunderstood by professionals that usually carry out the impact assessment.

4. SIM SOLUTION. STRATEGIC AND OPERATIONAL APPROACH

As the reader will be able to see during the case, the self-management program is a non-formal educational tool based on the principles born out of the conceptual and measurement framework of the Quality of Life Model (QoL), (Shchalock, Bonham & Verdugo, 2008).

Although the QoL model offers its own methodology to assess the individual's quality of life, this case study reveals how the Theory of Change (ToC) and some of its elements (results framework, assumptions, indicators and causal pathway) might be embedded in a disability program to improve its design, planning and impact assessment.

4.1. OPERATIONAL APPROACH: Theoretical SIM concept that can be used to solve the problem

The model of Quality of Life (QoL)

The model of Quality of Life (QoL) has increasingly being applied to people with intellectual disability over the past 20 years" (Schalock, 2004). In fact, it is used as a reference framework by many intellectual disability organizations. They use this approach as a guide to implement their programmes and to measure the personal outcomes. QoL is a multidimensional phenomenon based on the ecological paradigm in which disability and human functioning are based and explained by the interactions between environmental and personal characteristics. The

ecological paradigm understands disability as an individual limitation in a social context (Brown et al., 2009), and it is based upon a system perspective in which several environments (macro, meso, micro...) are influencing the person´s wellbeing (Verdugo et al., 2005).

The conceptual framework of the QoL model (see **Table 37**) is based on 3 crucial terms:

- **Factors:** are the overall latent construct of the model.

- **Domains:** are considered the dimensions composing the personal wellbeing.

- **Indicators:** are behaviors, perceptions and conditions that offer a clue of a person's wellbeing.

Table 37. Quality of life: conceptual and measurement model

Factors	Domains	Exemplary indicators
Independence	Personal development	Education status, personal skills, adaptive behavior
	Self-determination	Choices/decisions, autonomy, personal control, personal goals
Social participation	Interpersonal relations	Social networks, friendships, social activities, interactions, relationships
	Social inclusion	Community integration/participation, community roles, supports
	Rights	Human (respect, dignity, equality) legal (legal access, due process)
Well-being	Emotional well-being	Safety and security, positive experiences, contentment, self-concept, lack of stress
	Physical well-being	Health and nutrition status, recreation, leisure
	Material well-being	Financial status, employment status, housing status, possessions

Source: Buntix & Schalock (2010).

As this management program has the ultimate objective to improve the independence (factor) and social inclusion (dimension) of the target group, it is worth to explain these two terms:

- **Independence** could be understood as the "ability to take action to manage one´s affaires and provide for oneself, thereby solely relying on one´s efforts, resources, judgment and abilities, without requiring help or support from others" (Sandjojo et al., 2018a). Two other concepts are closely related to the concept of independence: independent living and self-management. Independent living is defined as "the control over one's life based on the choice of acceptable options that minimize reliance on others in making decisions and in performing everyday activities" (Rauch et al., 2010).

It might include activities such as the accomplishment of several social roles or the participation in the community on daily bases (Frieden et al., 1979). On the other hand, self-management is defined as the set of actions that people with intellectual disabilities might undertake to achieve self-selected outcomes (Sandjojo et al., 2018b).

- **Social inclusion** is the process of a loss of integration or participation of the people in a society and in different social, economic and political fields (According to the Spanish National Action Plan on Social Inclusion 2013-2016). It is a complex and multi causal phenomenon that must be addressed from a holistic approach. From the academic point of view, social inclusion might be associated with the person's degree of integration in the social, political, and economic framework of a society (Oxoby, 2009). It can also be associated to the abandonment of mainstream norms (Lafree, 1998; Liebow, 1967), or the generation of separate subcultures (Oxoby, 2004; Hagan and McCarthy, 1998). In the framework of the QoL model, social inclusion refers to a person´s community integration and participation; community roles and support; the access to public goods and services (public transportation, retirement clubs, evening classes, community associations and services...), and social network activities with people who are not staff, family members or other people with ID.

The Theory of Change (ToC)

The Theory of change (ToC) arose from the work undertaken by the Aspen Institute in 1997 due to the difficulty to provide evidence of the link between the activities of a social intervention (input) and its desired final impacts (results). ToC is a method that explains how a given intervention, or set of interventions, is expected to lead to specific development change, drawing on a causal analysis based on available evidence (Unicef, United Nation Development Group).

This theory aims at explaining how the activities of a social intervention are designed to produce a series of "intermediate" results that contribute to achieve the final intended impacts (Rogers, 2014). ToC helps to describe and illustrate how and why a desired change is expected to happen in each context. In this way, the theory of change can help social action designers and evaluators to articulate a framework and a set of underlying assumptions (hypothesis) of how and why the final change (impact) will occur (Reinholz & Andrews, 2020). ToC tries to establish the causal pathway from the situation at the beginning of the social intervention and the expected change at the end of it, showing what is needed to achieve the objectives and to reach the impact.

Moreover, the evaluation based on the Theory of change is usually represented as a map or graphic form describing how the activities (inputs) will produce the change, explaining the links between the activities the wished short-term (outputs), intermediate (outcomes) and, finally, the desired long-term impact.

Summing up, ToC can help evaluators to state how they expect a program to work, and to articulate and make explicit the underlying assumptions (Reinholz & Andrews, 2020). Among the theory, the term "results" is used to include outputs, outcomes and impacts, where impacts are the final outcomes affecting the well-being (Mayne, 2015). Additionally, evaluators following this approach should take into account that these three types of outputs are linked, sequenced in a particular order and might be depicted through a roadmap, or logic chain, which should start with the implementation of the activities (inputs), focusing first to accomplish the outputs, second the outcomes and finishing with the achievement of this so-called final impact.

4.2. OPERATIONAL APPROACH: ACTIONS. How can this SIM concept be applied to solve the problem and which tools are needed?

From the analysis of these models and focusing on the conceptual meaning of three types of results (outputs, outcomes, and impacts), it must be highlighted that:

- The three results are strategic different pieces of the project roadmap. The concept "Outputs" refers to the direct results from the activities (goods, services provided and infrastructures); "outcomes" is linked to changes in behaviors; and "impacts" should be associated to a broader change in the well-being of the society or target group.

- The three types of results also describe changes associated to three different temporal levels (outputs: short-term; outcomes: medium-term; and impact: long-term).

- The casual pathway means that the three results are dependent of each other. The degree of the achievement of a result compromises the attainment of the following one of the chain.

- Although project teams tend to focus their efforts on producing deliverables (outputs), the real purpose of a project must be to achieve given outcomes that will yield measurable impacts.

But in practice, for disability professionals (overall for those with less impact evaluation experience, running a low-budget program or working in a small disability organization), to properly consider the three results (outputs, outcomes and impacts) in the design and evaluation of a social program might be a arduous task.

In practice, and to start working with this approach, the most positive contributions of these models for non-expert disability evaluators would probably be:

1. Help them to understand the intrinsic characteristics and differences among the three types of project results:

   a) Outputs (short-term results and referred mostly to activities);

   b) Outcomes (mid-term results and usually linked to changes in behaviors);

   c) Impact (referred to broader long-term global changes improving the well-being of the target group)

   This knowledge might help evaluators to design and implement the whole evaluation process by: a) improving their capacity to find and use a wider range of evaluation methods and indicators, and b) helping them to organize and prioritize the results according to their temporal dimension and the types of changes they pretend to reach.

2. Improve their understanding of the pure concept of "impact" and its relevance as:

   a) The final general long-term purpose of any social program (desired outcome). Said in other words, impact is the true reason of the existence of the program/project.

   b) The best way to justify the investment to the financial supporters and stakeholders.

   This might lead to a more efficient distribution of the evaluation resources, allocating the necessary resources to assess the long-term impact.

3. By depicting the social program through a roadmap, logic chain or causal pathway:

   a) Evaluators will have a better view in any given moment of how the project is working and achieving its results (better activities follow-up and monitoring).

   b) It will be easier for program evaluators to make explicit and public the social program to donors and stakeholders.

   This might lead a better project internal coherence (target group needs, project objectives, inputs, outputs, outcomes, impacts) and a higher transparency.

4.2.1. Self-management program

The self-management program (SMP) is an innovative tool that has the objective to improve the independence and social inclusion of people with intellectual disabilities. Self-management is an overarching term involving the person's cognitions and actions that deliberately influence their behavior in order to realize self-selected outcomes.

SMP is a physical space -it might also be virtual- where 8/10 people with intellectual disabilities meet regularly, in a free environment, expressing their wishes and needs, setting up the working rules and the expected outcomes to be achieved by the program.

People with intellectual disabilities discuss, state and adjust their personal goals, taking their own decisions -and expressing the support they need to put the actions into practice.

a. Target group

Eight persons with mild intellectual disability with autonomy in the activities of the daily life. According to the QoL model, they need intermittent support in the skills needed to live in the community. They have language and reading skills of the second level of primary school, and good level of comprehensive and expressive language. Their cognitive limitations are manifested in the skills that demand to intervene in their abstract thinking.

b. Project objectives

As a result of the participation in these programs, PWID improve their competences and achieve greater levels of independence and social inclusion, therefore, better quality of life. The main objectives are:

- To improve the key competences (critical thinking, self-knowledge, creativity and decision taking) of PWID.

- To improve the quality of life of PWID measured trough the improvement of their independence and social inclusion.

- To improve the capacities of the organization to design and implement SMP.

c. Inputs: activities (implementation of a self-management program)

A self-management program is being implemented during a year (12 meetings x 2 hours), with 8 persons with intellectual disabilities taking part, guided by an educator (psychologist).

In addition, the 8 PWID took part in a 20-hour course to improve their competences related to self-determination and independence at the beginning of the program.

A tailor-made competence tool was developed and implemented by the organization to assess the following competences of PWID: critical thinking, self-knowledge, creativity and decision-taking.

In addition, meetings and co-design activities with stakeholders (legal representatives, friends, NGOs, local decision-takers, media...) were carried out in order to facilitate the achievement of those life goals demanded by PWID (free use of local facilities, accessibility, funding, attitudes changes....) and improve the project outreach and evaluation.

Finally, a dissemination plan was implemented mostly through social media activities.

4.2.2. The solution: Quality of Life (QoL) and Theory of Change (ToC)

As the reader will be able to see below, the proposed case solution does not replace the QoL evaluation methodology by the one supported by the ToC. The case solution is a combination of elements of both methodologies to produce a more effective impact assessment methodology; but still familiar, to some extent, to the disability field. Accordingly, the tools used to collect the information are very common for disability professionals (Likert scales, interviews, meetings, a standard disability validated scale, etc.).

In addition, it must be highlighted that the impact assessment methodology proposed does fulfill the two most important evaluation requirements of the QoL model:

a) It is focused on measuring personal outcomes and values.

b) It embraces double assessment criteria: person's satisfaction (personal appraisal - subjective measure), and the improvements in the individual functioning (functional assessment - objective measure).

Reaching this point, it must be stated that the contribution of the ToC approach to the program assessment process has been produced at different levels:

a) Conceptual level: contributing to better understand the intrinsic characteristics of two key assessment terms: "results" (outputs, outcomes and impacts), and "assumptions".

b) Strategic level: providing a methodology to integrate in a comprehensive way these "results" and "assumptions" with in a logic framework, or casual pathway, being able to explain how and why the whole assessment process works.

The ToC approach proposes the use and implementation of a great amount of models, concepts, tools, relationships among factors, stakeholders involvement, evaluation question, etc. All of them create a new assessment ecosystem which contributes to open evaluators minds, make them to reflect about the whole impact process, improving their capacity to find new solutions and a wide range and more accurate program outputs, outcomes and impacts.

As a result of this deep reflection and thanks to the ToC framework, it has been possible for the evaluators to find 16 program outputs, 8 program outcomes and 1 final desired impact and classified them (See **Table 38**).

In addition, as it was explained before, "assumptions" are the salient events and conditions that have to occur for each link in the causal pathway to work as expected. They are hypothesis which help to understand how and why the final impact will occur. The program evaluators have found the following program assumptions:

Table 38. Classification of program results according to the Theory of Change

Planned work		Classification of intended results (3 types of results)		
Inputs	Activities	OUTPUTS *Short-term and direct results from the program*	OUTCOMES *Mid-term behavior changes*	IMPACT *Long-term broader changes in the PWID well-being*
• *Organizational facilities (rooms, didactic material...)* • *Community resources (sport and leisure centers, local NGOs support...)* • *Economic resources (Budget planned, pocket money...)* • *Human resources (psychologist, trainers)* • *Appropriate support given by the organization.*	• *20-hour course* • *Development of a self-management program (SMP)* • *Meetings with local authorities and key social agents.* • *Review of individual support plans.* • *Evaluation: passes of the assessment competence tool.* • *Social media dissemination plan (Facebook and website)*	❖ Participation of PWID in the 20-h course. ❖ PWID taking part in the self-management program. ❖ Drop off: Participant leavers. ❖ Complains from PWID and legal representatives ❖ Number of evaluation and satisfaction forms filled out by the participants in the course. ❖ Independence and social inclusion improvement proposals discussed and agreed by PWID during the self-management program. ❖ PWID's friends involved in the program (social inclusion). ❖ Meetings carried out with decision-takers, parents and legal representatives. ❖ Local community resources used during the program. ❖ Stakeholders involved in the program: number and type ❖ Interviews with educators, parents and legal representatives to improve the program results ❖ New accessibility regulations discussed and passed by the municipality to improve the social inclusion of PWID. ❖ Budget approved by municipality to invest on accessibility or social inclusion of PWID. ❖ Facebook followers and likes. ❖ Hits on the program website. ❖ News published on local media related to the self-management program.	❖ Improvement of competences of PWID after taking part in the 20-h course (critical thinking, self-knowledge, creativity and decision taking). ❖ Life-objectives settled to change by the PWID in their personal life. ❖ New social or sport activities taken up by PWID. ❖ Better and more frequent use of the community resources by PWID. ❖ Competence improvement and satisfaction of educators. ❖ Improvement of organization capabilities (work processes/tasks, new tools, climate change, efficiency improvement, etc.) ❖ Community change attitudes about independence and social inclusion of PWID. ❖ Improvement of stakeholder`s satisfaction (friends, legal representatives, local representatives, social agents, local media, etc.)	**Improvement of the quality of life of people with intellectual disabilities (independence and social inclusion)**

Source: own elaboration based on several sources.

1. *Assumptions that have to occur to reach the program outputs:*

   - Professionals have to believe on the effectiveness of Self-management program (attitudes).

   - Professionals have to have the proper competences to implement the program.

   - The 20-hour course contents are appropriate. It provides enough competences.

   - PWID like the program and understand its benefits.

   - Friends and legal representatives agree on the benefits of the program.

2. *Assumptions that have to occur to reach the program outcomes:*

   - PWID are confident to change their life-goals.

   - PWID propose changes in their lives to live more independently.

   - Disability educators gain confidence to implement self-management programs.

   - The disability organization is willing to change its working methodology.

   - Municipality improves its activity offering and the accessibility of facilities.

   - Legal representatives, families and friends are willing to support the changes and are involved in the program activities.

   - Key stakeholders support and are involved in the process.

3. *Assumptions that have to occur to reach the program impact:*

   - The proposed changes in the personal plans (life goals, activities…) are properly transferred to the PWID activities of the daily life.

   - PWID appreciate the benefits of the implementation of new activities.

Once we have determined the program results and assumptions, it is easier to design all the program assessment indicators that should be linked with these assumptions and the expected results (see **Figure 16**).

As an example, the only impact indicator settled in the self-management program (Improvement of the quality of life of people with intellectual disability) has been fully developed and showed in **Table 39**.

The case solution offered in this self-management program not only combines the broad conceptual knowledge offered by ToC (assumptions, indicators, outputs, stakeholders involvement…) and the QoL (Subjective and objectives measures), but also, by graphically depicting it (**Figure 16**), the roadmap between the activities and the final impact becomes easier to understand, follow-up and evaluate; therefore more manageable and easily communicable for the organization.

At strategic level, it might be stated that ToC has helped the disability organization to implement a new planning and evaluation framework with the following characteristics:

a) The relevant elements and their links stand out and are clearly visualized by the organization, the stakeholders, and donors.

b) The self-management program elements are better aligned, not only among them, but also with the organization strategy; with the public health objectives (Sullivan and Stewart, 2006), and the community interest.

c) It increases the effectiveness, efficiency and responsiveness of the services offered by the organization.

d) It contributes to produce an evidence-based self-management program.

Table 39. Indicator proposed to assess the program impact

Name of the indicator	*Improvement of the quality of life*
Objective	**To improve the levels of independence and social inclusion of people with intellectual disability, therefore their quality of life.**
Definition of the indicator	The conceptual framework of the quality of life model is based on: a) factors; b) domains and c) indicators. They are considered as the dimensions composing the personal well-being. According to this model: "A person experiences Quality of life when their needs are met and when they have the opportunity to pursue life enrichment in major life activity settings" (Verdugo et al., 2012).
	The self-management program has been specifically designed to improve one dimension (independence) and one factor of the model of quality of life, assuming that an improvement of these two terms will result in an improvement of the participants´ the quality of life. It is also likely that the program activities result in an improvement of the other dimensions and factors besides of independence and social inclusion.
	Therefore, the assessment of the impact of the self-management program will focus on determining if the participants have now greater levels of independence and social inclusion, but also to measure the general level of quality of life.
Goals	*Quality of life. Quantitative measure:*
	1. The statistical analysis of the collected data from the quality of life scale shows significant differences in the means scores of the global scale.
	2. Satisfaction of PWID participating in the program (80%).
	3. Satisfaction of educators participating in the program (80%).

Table 39 *(cont.).* Indicator proposed to assess the program impact

Goals (cont.)	*Quality of life. Qualitative measure:* 4. Analysis of qualitative information. Variables: new activities undertaken, change of attitudes and concepts related to independence, change of supports given by educators; change in their personal plans, change of life goals and improvement of the performance of activities undertaken. *Social inclusion. Quantitative measure:* 5. The statistical analysis of the collected data from the quality of life scale shows significant differences in the means scores for the dimension of social inclusion. *Independence. Quantitative measure:* 6. The statistical analysis of the collected data from the quality of life scale shows significance differences on the means scores of the factor of independence.
Acceptance criteria	1. The means scores may suggest some improvement, but not statistically significant. 2. 60% 3. 60% 4. – 5. The means scores may suggest some improvement, but not statistically significant. 6. The means scores may suggest some improvement, but not statistically significant.
Measuring tools	1. Educators passing the INICO-FEAPS Scale: Comprehensive Quality of Life Assessment of people with intellectual and developmental disabilities. 2. Satisfaction questionnaire: Likert scale. 3. Satisfaction questionnaire: Likert scale. 4. 3 focus groups: 1 with participants (8); 1 with educators (8); and 1 with legal representatives (8). 5. Educators passing the INICO-FEAPS Scale: Comprehensive Quality of Life Assessment of people with intellectual and developmental disabilities (only items of the dimension of social inclusion) 6. Educators passing the INICO-FEAPS Scale: Comprehensive Quality of Life Assessment of people with intellectual and developmental disabilities (only items of the factor independence)
Frequency of the measurement	1. Twice: at the beginning (M1) and the end (M12) of the program. 2. Once: at the end of the program. 3. Once: at the end of the program. 4. Focus groups carried out at the end of the program. 5. Twice: at the beginning (M1) and the end (M12) of the program. 6. Twice: at the beginning (M1) and the end (M12) of the program.
Facilitator	IVASS
Person responsible	J. G.

Source: own elaboration.

Improvement of the quality of life of people with intellectual disabilities (independence and social inclusion)

Impact indicators

IMPACT

Assumptions and risks

1. The proposed changes in the personal plans (life goals, activities...) are properly transferred to the PWID activities of the daily life
2. PWID appreciate the benefits of the implementation of new activities

1. Improvement of the skills of PWID disaggregated by type of skill
2. Community attitude changes towards independence and social inclusion
3. Improvement of organization capabilities
4. Changes in the local community (accessibility, regulations passed...)
5. Satisfaction and competence improvement of educators
6. Stakeholders' satisfaction

Outcome indicators

Outcomes

Assumptions and risks

1. PWID are confident to change their life goals
2. PWID propose changes in their lives to live more independently
3. Disability educators gain confidence to implement self-management programs
4. The disability organization is willing to change its working methodology
5. Municipality improves its activity offering and the accessibility of facilities
6. Families and friends are willing to support and are involved in the activities
7. Key stakeholders support and are involved in the process

1. PWID participation: Number of hours of the program per participant
2. Number of educators taking part in the program and hours spent
3. Number of participants/ratio of dropouts
4. Quality of participation: relevance of improvement proposals stated by PWID
5. Number of complaints/ratio of complaints answered
6. Number of meetings and interviews with stakeholders
7. Number of organizations and people involved classified by type of stakeholder
8. Number of friends and relatives involved in the program
9. Budget spent classified by activity and stakeholder
10. Social media metrics (followers, likes, visits)
11. Press media articles issued, and news published on local media
12. Number and quality of internal and external reports issued

Output indicators

Outputs

Assumptions and risks

1. Attitudes: professionals have to believe in the effectiveness of SMP
2. Professionals have the proper competences to implement the program
3. The 20-hour course contents are appropriate. It provides enough competences
4. PWID like the program and understand its benefits
5. Friends and legal representatives agree on the benefits of the program

**INPUT Self-management program + 20 h course**

Figure 16. Self-management program. Causal pathway according to the Theory of Change

Source: own elaboration based on UNICEF, 2014.

7. GENERAL CONCLUSIONS AND LESSONS LEARNED

7

7.1.   General conclusions and lessons learned

In the context of the SIM project, learners participated in a transnational learning activity, in which they were trained in Social Marketing concepts, adapted to the social sector. During this training, participants learned the principles of Social Marketing and some useful techniques and strategies to tackle social exclusion of disadvantaged groups. Through the case studies approach, the professionals were able to develop alternative and innovative solutions to social inclusion problems. This training was fundamental to set the basis for the Pedagogical Strategy reported in this book. In developing the strategy, the same participants were coached by marketing experts and developed real cases studies, relying on real problems in their daily life working activities. The learners acquired a large spectrum of marketing techniques that they can use to tackle social inclusion problems in the disability field.

The learners demonstrated that, after the training, they were autonomously capable of adopting the Social Marketing approach, developing the benchmarks, analyzing the situation (using techniques such as SWOT analysis), precisely identifying problems and setting objectives and activities to solve them, researching target audiences needs and which behavior(s) that they desired to change. Through the coaching sessions, they then decided on the most appropriate marketing solutions to solve the cases, based on research previously conducted.

This book is evidence that the Social Marketing framework can be effectively and efficiently used in the disability sector, and the case studies developed serve as valuable resources for all front line workers, practitioners, policy makers, and students of Marketing and Social Marketing. In fact, the case studies provide the reader with marketing solutions that can be used to help them design more effective social change interventions in the field of disability and inclusion, and provide solid examples to follow in order to start developing their own interventions.

This work is a vivid example of how different, yet complementary disciplines and from four country contexts can come together for a common cause. And, how with collaboration and effort, innovative solutions can be found to challenges, by leveraging on knowledge and assets that people and organizations already possess, leading to greater social good, policy changes, and behavior change, and social inclusion.

8. TECHNICAL REPORT ON EQF AND ECTS

8.1.   Objectives

The general objective is to provide learners with the knowledge, skills and attitudes that will enable them to develop their ability to analyze, plan and anticipate the challenges that arise in the environment of social inclusion companies, with the aim of selecting and effectively implementing one or more marketing strategies in this field.

Learners should be able to understand the company's environment as a prerequisite for selecting marketing strategies appropriate to each situation. Moreover, they should delve into the basic components of the marketing strategies that a social inclusion company can choose from, based on its resources and the dynamic environment in which it operates, which is often subject to significant changes related, to a large extent, to the rise of new technologies, the health crisis and the globalization of markets.

In specific, learners should know:

- How to use marketing tools to motivate and involved trainers and care assistants' to avoid absenteeism.

- How to use marketing tools to encourage children, young people and other persons with disabilities to play sports.

- How to use marketing tools to encourage professional and informal caregivers to improve their knowledge in order to deliver better services.

- How to use marketing tools to promote active aging.

- How to use marketing tools to attract successful entrepreneurs/traineers to be enrolled in training programs.

- How to use marketing tools to improve sales of products from social inclusion companies.

- How to use marketing tools to find and involve young volunteers in social inclusion companies.

- How to use marketing tools to identify key indicators for disability organizations to improve the way in which social interventions impact is measured.

8.2.   Competencies acquired

The learners from social inclusion companies will acquire the following competences after working on themes included in this book:

- Organization and planning of a marketing tool considering time and budget limitations.

- Higher motivation to carry on their work.

- Marketing orientation: understanding customer and worker behavior.

- Responsibility and perseverance.

- Decision making.

- Understanding the main strategic marketing options available to solve various problems in the social sphere.

- Flexibility and change orientation to reach the objectives from a different approach.

- Innovation.

- Entrepreneurship.

- A deeper knowledge about the companies presented in this subject and its benefits for people with disabilities and for society in general.

- Higher involvement in the disability framework.

- Empathy with a client.

- Promoting the development of attitudes and values that establish favorable conditions for ethical behavior in the development of professional activity.

- Learning to work in a team based on assertiveness and constructive criticism.

- Encourage a favorable attitude towards self-learning.

- Encourage the development of ethical behavior in the development of business activity related to marketing decisions.

- Encourage an interest in lifelong learning on issues related to their work.

8.3.   Skills

The learners from social inclusion companies, will acquire the following skills that will be developed through the transfer of knowledge:

- Communication skills.
- Creativity, decision making and problem solving.
- Writing skills to express how to proceed to solve real problems.
- Analysis, synthesis, organization and planning.
- Data analysis and results presentation.
- Know digital media to connect with the audience and encourage behaviors.
- Work under time and budget limitations.
- Readiness to change.
- Interpersonal communication.

8.4.   Abilities

The learners are required to have the following abilities to be able to develop their tasks:

- Learning abilities, acquiring better aptitudes in marketing tools.
- Self-motivation abilities, to develop the professional tasks from another perspective.
- Flexibility abilities, adapting the daily work to the new changing environments.
- Time management abilities, attending different problems at the same time adopting new marketing resources.
- Research abilities, analyzing problems and investigating how to solve them.

8.5. Student workload and ECTS assignment

This point includes the content description for a **4.5 ECTS subject.**

Table 40. Students work volume

Activity	Hours/course
Attendance at theory classes	30 hours
Attendance at practical classes	15 hours
Total hours in the classroom	**45 hours**
Visit to a Social Inclusion Company	3.5 hours
Preparation of theory classes	30 hours
Preparation of practice classes	10 hours
Group work (physically or virtually)	24 hours
Total hours outside the classroom	**67.5 hours**
Total workload	**112.5 hours**

8.6. Analytical program

The subject has been organized in five main topics, as it has been described in point 3.2. and it is specified below.

Topic 1. Social marketing for social inclusion

❖   *What is marketing? And social marketing?*   ❖   *Social Marketing Planning Steps: ADDELAST MODEL*   ❖   *The importance of the stakeholders*   ❖   *Main theories to apply*

Lectures

❖   Transnational Partnerships SIM (2021) SIM HANDBOOK - A practical guide for applying Social Marketing in the disability sector; Ed. Partnership SIM, APCC Erasmus program; Portugal, ISBN: 978-972-99566-8-3

Topic 2. Consumer Behavior: Segmentation and Targeting

- ❖ *Behavior change: identifying the problem*
- ❖ *Audience* research*: insights and customer orientation*
- ❖ *Objectives,* Segmentation *and targeting*
- ❖ *Added Value: positioning*

Lectures

- ❖ Alves, H. (2010). The who, where, and when of social marketing. Journal of Nonprofit & Public Sector Marketing, 22(4), 288-311.
- ❖ French, J. (2017). The importance of segmentation in social marketing strategy. In Segmentation in social marketing (pp. 25-40). Springer, Singapore.
- ❖ Walsh, G., Hassan, L. M., Shiu, E., Andrews, J. C., & Hastings, G. (2010). Segmentation in social marketing: Insights from the European Union's multi-country, antismoking campaign. European Journal of Marketing.

Cases related

- ❖ *Case:* Improving children and young people with disabilities playing sports.
- ❖ *Case:* Motivating people with physical disabilities to engage in physical exercise and enjoy its benefits.

Topic 3. Integrated marketing Communication

- ❖ *Steps to* develop *a successful communication campaign*
- ❖ *Message* of *a communication campaign*
- ❖ *Tool 1:* Advertising*: Medias Off and On*
- ❖ *Tool 2:* Public *Relations*
- ❖ *Tool 3:* New *technologies and other tools*

Lectures

- ❖ Akbar, S. I., & Özgül, E. (2018). Impact of social media usage activities on brand awareness of young consumers. Dokuz Eylül Üniversitesi İktisadi İdari Bilimler Fakültesi Dergisi, 33(1), 217-234.
- ❖ Evans, W. D. (2008). Social marketing campaigns and children's media use. The Future of Children, 181-203.

❖ Henley, N., Raffin, S., & Caemmerer, B. (2011). The application of marketing principles to a social marketing campaign. Marketing Intelligence & Planning.

Cases related

❖ *Case:* Promoting active aging
❖ *Case:* Finding & motivating young volunteers to participate in inclusive leisure activities organized on regular basis

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Topic 4. Internal Marketing

❖ *Internal* marketing*: definition*

❖ *Internal* marketing *dimensions in social marketing*

❖ *Internal* Marketing *approaches*

❖ *Improving Voluntaries' Quality of Life*

❖ *Voluntaries' Engagement*

Lectures

❖ Qiu, J., Boukis, A., & Storey, C. (2021). Internal Marketing: A Systematic Review. Journal of Marketing Theory and Practice, 1-15.
❖ Varey, R. J., & Lewis, B. R. (1999). A broadened conception of internal marketing. European Journal of Marketing.
❖ Wieseke, J., Ahearne, M., Lam, S. K., & Van Dick, R. (2009). The role of leaders in internal marketing. Journal of marketing, 73(2), 123-145.

Cases related

❖ *Case:* Avoiding trainees' high absenteeism
❖ *Case:* Reducing caregivers' absenteeism
❖ *Case:* Encouraging informal caregivers, who provide palliative care services to their relatives in the home environment, to acquire professional qualification
❖ *Case:* Attracting successful entrepreneurs/trainees to be enrolled in training programs

Topic 5. Product and Brand

- *Brand creation*
- *Problems solutions in Social Inclusion companies related to this topic*

Lectures

- ❖ Andreasen, A. R. (2002). Marketing social marketing in the social change marketplace. Journal of Public Policy & Marketing, *21(1), 3-13*.
- ❖ Jiménez-Marín, G., Zambrano, R. E., Galiano-Coronil, A., & Tobar-Pesántez, L. (2021). Brand management from social marketing and happiness management binomial of in the age of industry 4.0. Journal of Legal, Ethical and Regulatory Issues, 24(3), 1-10.
- ❖ Miethlich, B., & Oldenburg, A. (2019). How social inclusion promotes sales: An analysis of the example of employing people with disabilities. Journal of Marketing Research and Case Studies, 463316.
- ❖ Miethlich, B., & Oldenburg, A. G. (2019). Social inclusion drives business sales: A literature review on the case of the employment of persons with disabilities. In 33nd International Business Information Management Association Conference (IBIMA), Education Excellence and Innovation Management through Vision 2020, Granada, Spain, 10-11.04. 2019 (pp. 6253-6267). King of Prussia, PA: IBIMA Publishing.

Cases related

- ❖ *Case:* Improving sales of hand-made Easter decorations produced within the occupational therapy program

Topic 6. Results Measurement

- *The model of Quality of Life (QoL)*
- *The Theory of Change (ToC)*
- *Planned work and results*
- *Design the program assessment indicators*

Lectures

- ❖ Dossi, A., & Patelli, L. (2010). You learn from what you measure: financial and non-financial performance measures in multinational companies. Long Range Planning, 43(4), 498-526.
- ❖ Fitzpatrick, S., & Sharma, M. (2017). Can Inclusion be Measured in a Quantitative Way, Just Qualitative, or a Combination?.
- ❖ Lubbers, M. J. (2021). In Good Company? Personal Relationships, Network Embeddedness, and Social Inclusion. Social Inclusion, 9(4), 203-210.
- ❖ Suciu, M. C., Noja, G. G., & Cristea, M. (2020). Diversity, social inclusion and human capital development as fundamentals of financial performance and risk mitigation. Amfiteatru Economic, 22(55), 742-757.

Cases related

- ❖ *Case:* Designing indicators for disability organizations to improve the way in which social interventions impact is measured

8.7.   Evaluation

Continuous assessment (100% of the final mark). Continuous assessment is used to evaluate the student's progress learning process, especially in relation to the generic competences indicated in this programme. The teacher will periodically offer feedback to learners on their progress, indicating which aspects they should progress, indicating to them which aspects they should improve.

The evaluation of each topic will be based on the solution of diverse questions to reflect on each of the problems presented.

Questions to evaluate each topic related with cases

Topic 1: SOCIAL MARKETING FOR SOCIAL INCLUSION

General question
Why is it so relevant to deeply understand your target audience? Could you indicate a situation in which you could benefit from research and costumer orientation to solve your organization's or a social inclusion organization's problems?

❖ *Case:* How to reduce the level of absenteeism of care assistants?

- *Question 1:* What is the main challenge? What causes the problem and who is affected by it?

- *Question 2:* Why was is relevant and necessary to conduct primary and secondary data before implementing the marketing strategies? (Benchmark: Costumer orientation)

❖ *Case:* How the informal caregivers who provide palliative care services to their relatives in the home environment can be encouraged to acquire professional qualification?

- *Question 1:* What insights gained about the target audience were used to inform this project and change behaviors?

- *Questions 2:* This case used marketing strategies to provide solutions. Why did they choose these specific strategies? Based on what?

Topic 2: CONSUMER BEHAVIOR: SEGMENTATION AND TARGETING

General question
Could you indicate three situations that you/your organization or a social inclusion organization could use a segmentation/targeting strategy?

❖ *Case:* Improving children and young people with disabilities playing sports

- *Question 1:* How would you identify the potential targets that should be reached by this organization to change behaviors?

- *Question 2:* How would choose the best message in a communication campaign to generate awareness among the different targets?

❖ *Case:* Motivating people with physical disabilities to engage in physical exercise and enjoy its benefits

- *Question 1:* What elements must be taken into account to talk about a strong corporate identity that helps any organization to transmit its personality and values, while being a powerful tool that causes a positive impact in the minds of its users?

- *Question 2:* What does it mean to involve stakeholders in improving the physical condition of people with disabilities?

Topic 3: INTEGRATED MARKETING COMMUNICATION

> **General question**
> Could you indicate three situations that you/your organization or a social inclusion organization could use a communication strategy?

- ❖ *Case:* Promoting active aging
  - Question 1: Which media are best suited to reach the target audience of this communication campaign? Justify your answer.
  - *Question 2:* Could you write the slogan for a campaign to promote active aging? Does the slogan/message communicate the positioning you would like to reach?
- ❖ *Case:* Finding & motivating young volunteers to participate in inclusive leisure activities organized on regular basis
  - *Question 1:* In the case, there are some motivations of young people to participate as volunteers. What you can offer them to be motivated? Stablish at least three mechanisms.
  - *Question 2:* There are diverse communications tools to be used to find young volunteers. Could you choose the most appropriate ones in your country taking into account the audience profile?

Topic 4: INTERNAL MARKETING

> **General question**
> Could you indicate three situations that you/your organization or a social inclusion organization could use an internal marketing strategy?

- ❖ *Case:* Avoiding trainees' high absenteeism
  - *Question 1:* What social marketing campaigns related to trainees 'absenteeism have been promoted in your country? How long did they last so far? How do they communicate with the target audience?
  - *Question 2:* How do you implement a mentoring program for the VET trainees?

❖ *Case:* Reducing caregivers' absenteeism

- *Question 1:* Do you think that social marketing tools using positive appeals to express acknowledgement are the most or the least prevalent direction to encourage caregivers in your country?

- *Question 2:* what it means to have a strong corporate culture

❖ *Case:* Encouraging informal caregivers, who provide palliative care services to their relatives in the home environment, to acquire professional qualification

- *Question 1:* Indicates three ways to increase the ability to transfer the knowledge and skills of professional caregivers to other less experienced and less qualified people.

- *Question 2:* Mention three strengths and three weaknesses of the work of caregivers who provide services to people in need of palliative care.

- *Question 3:* Write two ways to improve the mental health of informal caregivers.

❖ *Case:* Attracting successful entrepreneurs/trainees to be enrolled in training programs volunteers to help instructors in their tasks

- *Question 1:* Could you define the target for this internal marketing campaign?

- *Question 2:* This case proposes diverse internal marketing tools: to create or integrate in an entrepreneurship platform, to identify 'ambassadors' among entrepreneurs, to create a guide for entrepreneurs, to create and always keep an up-to-date entrepreneurs/trainer's database. Could you propose at least two more, stating the objectives you would like to reach with them?

Topic 5: PRODUCT AND BRAND CREATION

General question
Could you indicate three situations that you/your organization or a social inclusion organization could use a product and brand creation strategy?

❖ *Case:* Improving sales of hand-made Easter decorations produced within the occupational therapy program

- *Question 1:* Which steps would you follow to refresh the logo/visual identity of this company?

- *Question 2:* How would you choose the new products this company could launch to the market to increase sales?

Topic 6: RESULTS MEASUREMENT

> **General question**
> Could you indicate three situations that you/your organization or a social inclusion organization could use results indicators to analyze social interventions?

- ❖ Case: Designing indicators for disability organizations to improve the way in which social interventions impact is measured

  - *Question 1:* Both quantitative and qualitative measures can be used to measure the usefulness of a social marketing action. If the action is to improve the employability of people with intellectual disabilities (PWID), which of the two alternatives would be better?, give an example of both types of measures.

  - *Question 2:* The negative effects of the COVID-19 pandemic on the most disadvantaged groups have, in most cases, resulted in increased inequality and social exclusion. Do you agree with this statement? Please justify your answer.

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- Marketing Trends: http://www.marketingtrends.org

- Classical articles: *http://www.latinmarketing.com*

- CEDEFOP research: https://www.cedefop.europa.eu

Data bases and entities.

- American Marketing Association: http://www.marketingpower.com

- International Association of Public Marketing and Non Lucrative: http://www.aimpn.org

- Association for Consumer Research (ACR): http://www.acrwebsite.org

- Boston Consulting Group: http://www.bcg.com/practice/practice.asp

- Commercenet http://www.commerce.net

- European Statistics: http://www.europa.eu.int/comm/eurostat/

- Euromonitor International: http://www.euromonitor.com (data and publications about industries, countries including market sales)

- European Marketing Academy: http://www.eiasm.be/emac/emac.html

- International Franchise Association: http://www.franchise.org (international information about franchises)

- Product Development and Management Association: http://www.pdma.org (to help new products launch).

- The Market Segmentation Company: http://www.marketsegmentation.co.uk

  Opinion blogs and Associations

- Australian Association for Social Marketing: https://aasm.org.au/

- CoreBrand: http://www.corebrand.com (BrandPower rankings information)

- Europan Social Marketing Association (ESMA): https://europeansocialmarketing.weebly.com/

- ImpactPlus (with information about inclusive marketing examples): https://www.impactplus.com/blog/inclusive-marketing-examples

- International Social Marketing Association: https://www.i-socialmarketing.org/

- Marketing about: http://marketing.about.com (news, opinion sections, marketing resources etc.).

- Marketing Inclusion Blog: https://www.marketinclusion.com/blog/

- PuroMarketing: http://www.puromarketing.com (news, opinion sections, marketing resources etc.).

Other learning resources

- Brand Republic (articles, videos etc.): http://www.brandrepublic.com

- BrandChannel del Grupo Interbrand (Brand information): http://www.brandchannel.com

- BuildingBrands: http://www.buildingbrands.com .

- Business Plan Archive (data bases with business plans): http://www.businessplanarchive.org

- Center for Business Planning (news and other useful information for business plans): http://www.businessplans.org/index.asp

- Consumer World (information about consumers) http://www.consumerworld.org

- CRMguru (information about segmeting with CRM): http://www.crmguru.com

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- Goodlogo!com (logs and coporate identity): http://www.goodlogo.com

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- MarketingProfs (lectures and articles about marketing): http://www.marketingprofs.com

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- USC Marshall (consumers' behaviour theories): http://www.consumerpsychologist.com

ANNEXES

ANNEX I. Standard template to homogeneously elaborate the mini-cases (pedagogical methodology)

Example: **Why my patients-students do not remember my instructions?**
Enounce a question using 8-10 words to illustrate a common problem (in the disabilities fields) you face on your daily work.
Participant in the course name and surname
Coach name and surname
Organization name (if it's allowed)

1. Brief description of the organization

Each participant will explain his/her organization profile: name, location, number of years operating, number of workers approximately in the center, number of users/patients etc. You can include a picture of the organization, tables, graphics to close it to the reader.

2. Problem presentation

Each participant will explain a common problem that he/she finds in a journey. That is, his/her professional needs.

3. Traditional solution

Each participant will provide a traditional solution for this problem from disabilities fields. What he/she has being doing in the past and the reasons to do respond like this

4. SIM solution: Pedagogical proposal

This part will be developed by an academic-coach. The idea is to solve the problem based on the adaptation of social marketing techniques and strategies available for social sector professionals. An academic approach will be followed.

All these SIM solutions for the enounced problems will constitute the pedagogical strategy

4.1.   STRATEGIC APPROACH. Social marketing benchmark

4.2.   OPERATIONAL APPROACH. Theoretical SIM concept that can be used to solve the problem

4.3.   OPERATIONAL APPROACH. Method and tools: How can this SIM concept be applied to solve the problem and which tools are needed?

5. Expected results: usefulness of the proposal

5.1.   INSTRUCTOR-EDUCATORS' COMPETENCES

5.2.   USERS COMPETENCES

6. Evaluation

ANNEX II. Planning template

This template is composed of topic, learning objectives, necessary resources - activities and assessment - for before, during and after the lesson, and suggestions for the use of the template.

<table>
<tr>
<td rowspan="8">**WEEK 1**</td>
<td colspan="4">**Topic:**

Theories and Approaches for Behavior Change</td>
</tr>
<tr>
<td colspan="4">**Learning objectives for topic:**

1. Explain the importance of behavior models and theories for nutrition practitioner.

2. Describe major concepts of selected change theories and models.

3. Describe major concepts of selected theoretical approaches to counseling.

4. Apply theory/approach to nutrition-related practical settings.</td>
</tr>
<tr>
<td colspan="4">**Resources needed:**

poster paper, markers, 5 minute video clip description of jigsaw activity for students, completed theory table (for students)</td>
</tr>
<tr>
<td></td>
<td>**Before Class**</td>
<td>**During Class**</td>
<td>**After Class**</td>
</tr>
<tr>
<td>**Activities:**</td>
<td>Read, take notes, watch lecture and videos</td>
<td>jigsaw activity</td>
<td></td>
</tr>
<tr>
<td rowspan="2">**Assessments**</td>
<td>Complete theory table (Low stakes worth 5 points of final grade)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dropbox on due date and bring a copy to class for in class activity</td>
<td>Instructor monitoring for understanding.
- Mini-summary from each group
- Clarify difficult concepts
- Clear up misconceptions</td>
<td>Essay questions as part of mild-term exam</td>
</tr>
<tr>
<td colspan="4">**Suggestions for using the Template:**

• Make sure learning objectives use action verbs so you can assess the students. The objective should align the assessments.

• **Resources:** this can be specific website, etc.

• **Activities can be:** lecture screen-cast; web 2.0 tools; discussions, etc.

• **Assessments can be low stakes:** such as a quiz, discussion board, focused discussion, and/or application of content using web 2.0 tool (e.g. www.goanimate.com which applies material using a cartoon), etc.</td>
</tr>
</table>

Source: Gilboy et al. (2014)

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