# Using Data to Tell Your Program Success Story

April 27, 2021

**RETAIN** | Retaining Employment and Talent After Injury/Illness Network

**AIR** — American Institutes for Research®

**ODEP** — Office of Disability Employment Policy

# How to Participate

Chat box and email:

- Use the chat box throughout the session to make comments and communicate your tech problems. Raise your hand and we'll call on you. Lower your hand after you've been called on.

- You also can communicate by email at RETAINTA@air.org.

Other helpful Zoom features:

- To access closed captioning, click on the link in the chat box.

- To add your state abbreviation to your name, find your name under "Participants," click "More" beside your name, and select "Rename."

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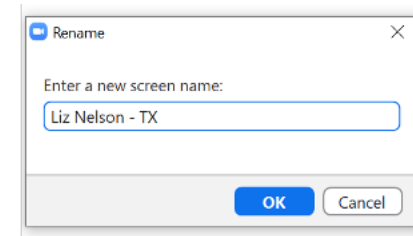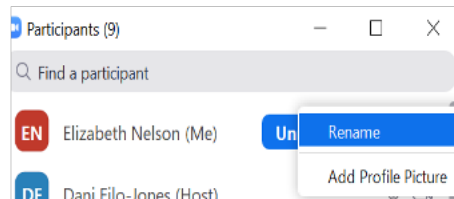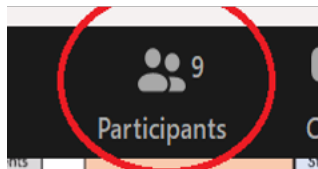
# Welcome

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# About RETAIN

- Retaining Employment and Talent After Injury/Illness Network (RETAIN)

- Joint initiative led by the U.S. Department of Labor (DOL) and the Office of Disability Employment Policy (ODEP), and funded by ODEP, DOL's Employment and Training Administration and the Social Security Administration

- RETAIN technical assistance (TA) funded by ODEP and housed at the American Institutes for Research (AIR)

- Focused on building state capacity in stay-at-work (SAW)/return-to-work (RTW) strategies across eight states

- Explores ways to help people who become ill or injured during their working years remain in the labor force

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# Disclaimer

These materials were prepared for the U.S. Department of Labor (DOL), Office of Disability Employment Policy, and Retaining Employment and Talent After Injury/Illness Network (RETAIN) state grantees by the American Institutes for Research and the presenting subject matter expert. The views expressed are those of the authors and should not be attributed to DOL, nor does mention of trade names, commercial products, or organizations imply endorsement of same by the U.S. Government.

# Objectives

Through this webinar, attendees will:

- Learn about developing effective communication products to translate and disseminate program successes to key stakeholders

- Understand the importance of strategy, stories, and social math to effective data translation and dissemination

- Learn how to ensure communication products can be evaluated for success

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# Today's Speaker



Patrick Cook

***Patrick Cook*** is a communication and social marketing professional with more than 20 years of experience helping federal, state, and local agencies and organizations plan and implement effective communication and marketing programs. With experience in a wide variety of health and safety issues—from disease prevention and health promotion to violence prevention and injury control—Patrick has helped government and nonprofit teams develop the skills and capacity to plan, implement, and evaluate effective communication efforts.

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# Using Data to Tell Your Program Success Story

April 27, 2021

Patrick Cook

# Our Work
# Plan for Today

Strategy

Stories

Social Math

Questions and Resources

# 1: Strategy

Cook & Sow

If you build it, will they come?
*Promotion*


If you build it, will they fund?
*Sustainability*

Photo credit: Scott K Baker / Shutterstock.com
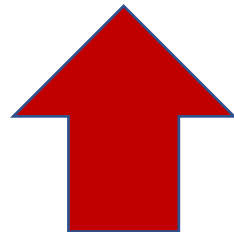
# Promotion

Engage priority groups (individuals in communities) who are affected directly by SAW/RTW and who can benefit from program, practice, or policy.
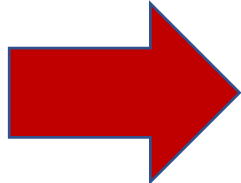
# Sustainability

Engage that stakeholders (decisionmakers and policymakers, community members, business leaders, and others) who can support and sustain the work of the initiative or program.

# Approaches to Program Communication

- Public relations (aka PR or strategic communications)

- Social marketing

- Marketing
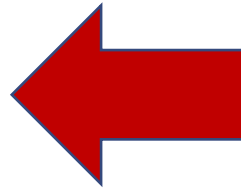
# Who do you want to _do_ what, why, and how?

# Why Share RETAIN Data?

- **Inform** service delivery and improve program processes.
- **Highlight** strengths to leverage and areas of improvement to address.
- **Sustain**—and expand—RETAIN programs.

*Ultimate goal? Improving **employment outcomes** for workers who suffered an injury or an illness*

# Communication Planning



**1. Fundamentals**

**3. Implementation and Evaluation**
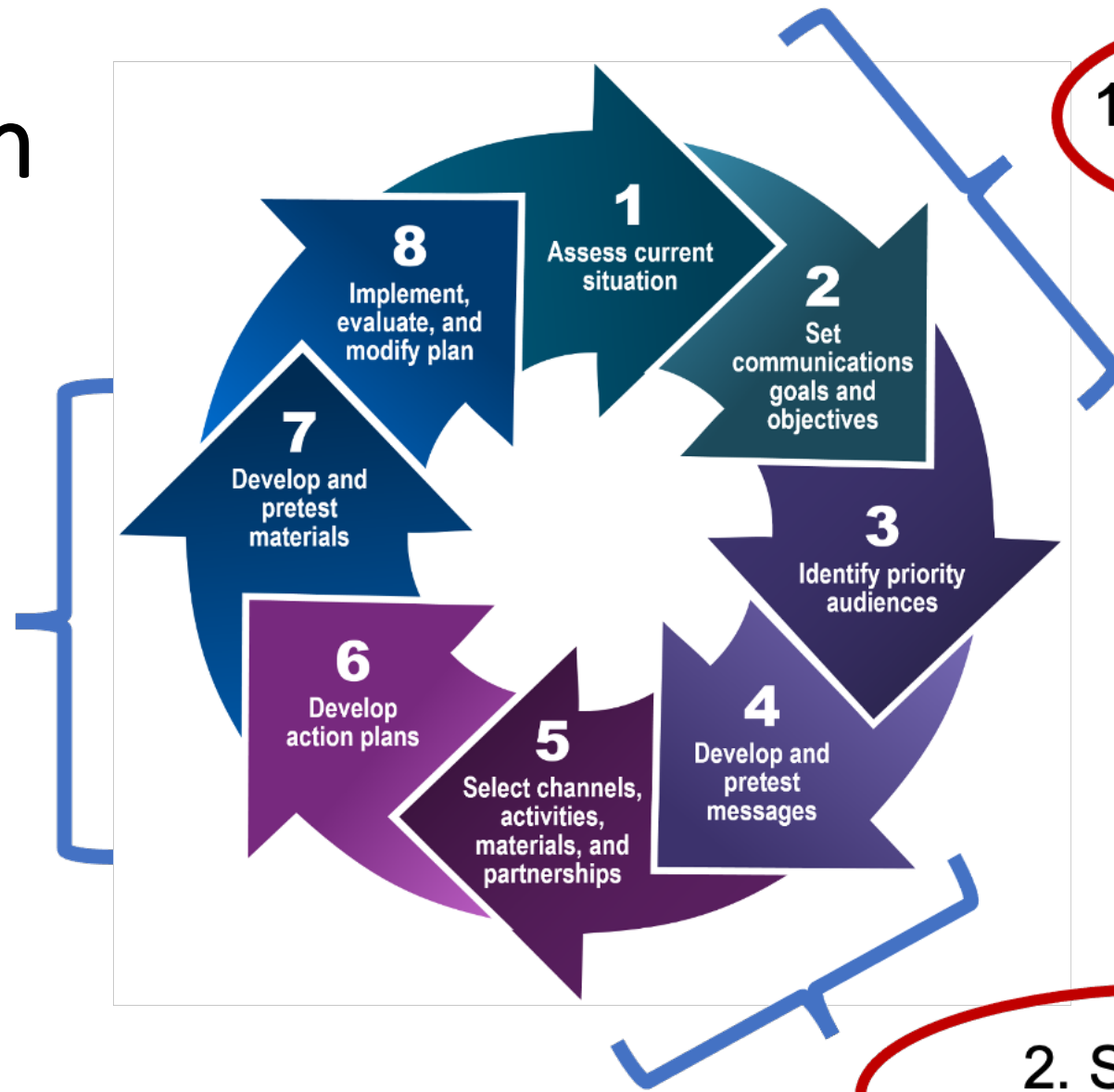
**2. Strategies and Tactics**

Diagram (clockwise cycle):
- 1 Assess current situation
- 2 Set communications goals and objectives
- 3 Identify priority audiences
- 4 Develop and pretest messages
- 5 Select channels, activities, materials, and partnerships
- 6 Develop action plans
- 7 Develop and pretest materials
- 8 Implement, evaluate, and modify plan

Source: Developed by Patrick Cook based on National Cancer Institute. (2001). *Making health communication programs work;* Kotler, P., & Lee, N. (2008). *Social marketing: Improving the quality of life.*

# SAMPLE: Program Communication Map

| | |
|---|---|
| **RETAIN Program Goal** | To increase employment retention and labor force participation of individuals who acquire and/or are at risk of developing disabilities that inhibit their ability to work.* |
| **Communication Goal** | Increase number of workers from who experienced injury working in warehousing and distribution and logistics participating in the [name] program. |
| **Objectives** | **Objective 1:** Increase participation in [community name] RETAIN services by young men who are injury working in warehousing and distribution by 25% by the end of 2022.<br>**Objective 2:** Increase referrals by healthcare providers to the [community name] RETAIN services by 10% by the end of 2022. |

| | |
|---|---|
| **Priority Audiences** | **Primary**<br>• Younger men, 25–34, who are at higher risk of injury because of pre-existing conditions and risk profile | **Secondary (stakeholders)**<br>• Policymakers<br>• Leaders and HR professionals at leading employers<br>• Healthcare providers<br>• Insurance leaders and adjustors |

| | |
|---|---|---|
| **Strategies & Tactics** | **1. Promote RETAIN services to workers.**<br>• Place ads in local online news outlets.<br>• Engage in social listening and participate where appropriate.<br>• Build digital and media partnerships.<br>• Train and support RETAIN ambassadors and digital influencers. | **2. Engage stakeholders in shared successes.**<br>• Create data dashboards to share with program partners.<br>• Develop and share infographic on the benefits of SAW/RTW programs.<br>• Develop and share presentation deck for partners.<br>• Provide TTA support to RETAIN ambassadors and digital influencers. | **3. Educate policymakers on the benefits of SAW/RTW Services**<br>• Develop and share infographic on the benefits of SAW/RTW programs.<br>• Develop and share factsheet during in-person visits with policymakers and staff. |

Source: https://www.dol.gov/agencies/odep/program-areas/employers/saw-rtw/about

# The "Who" in Our Campaign

Define audience segment by:

• Who are the people at highest risk?

• Who are the people most open to change?

• What are the critical-for-success groups?



Source: Lefebvre, C. (2013). *Social marketing and social change* Jossey-Bass.
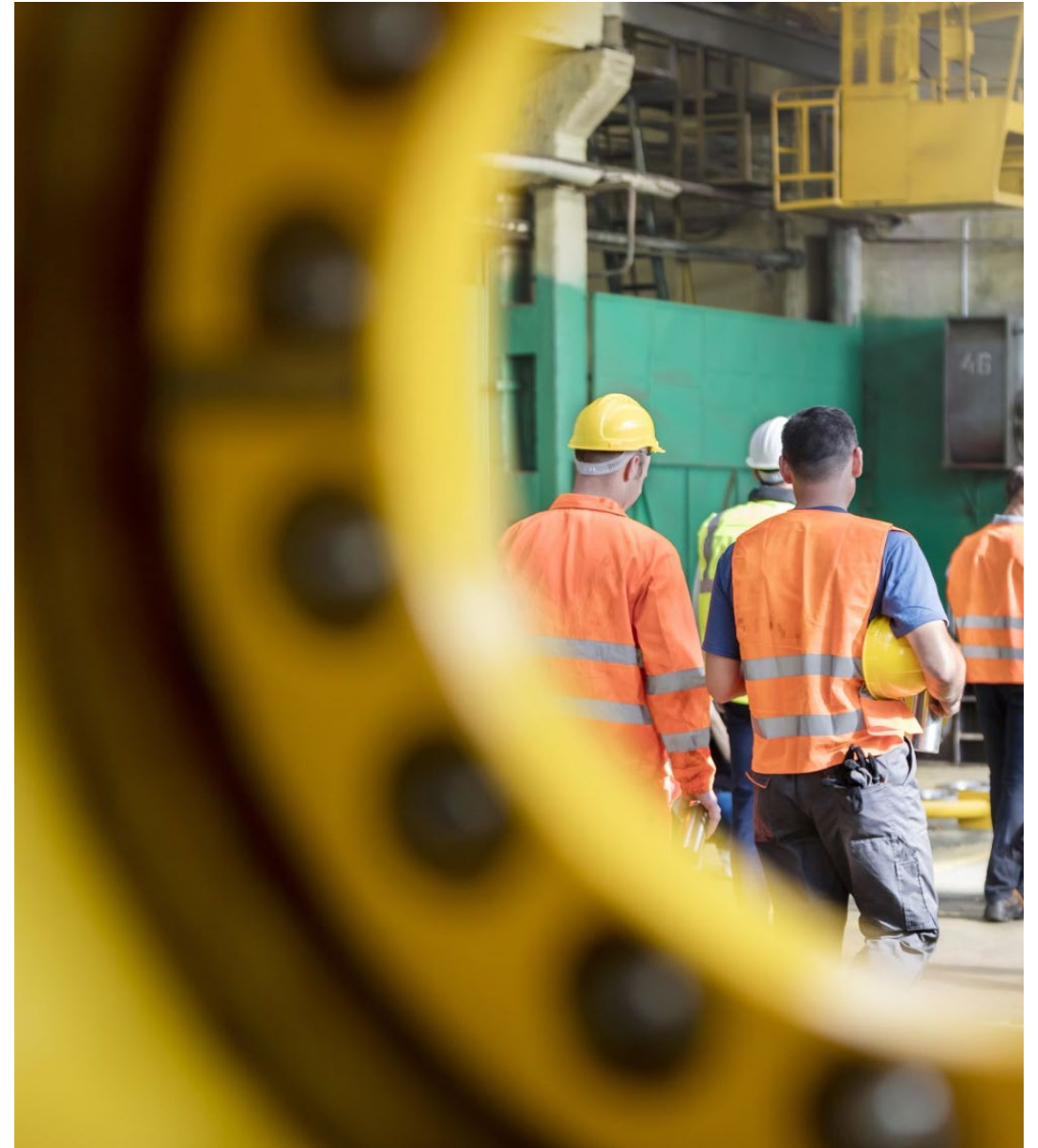
# "Marketing Mindset"

- Meet your audience where they are.
- Deliver data in formats that meet their needs and preferences.
  - Familiar channels, materials, activities, and partners
  - Supports decisions that *they need to make*

# Poll: Stakeholders essential to future success

# 2: Story

Cook
& Sow

**Data without stories** can give the right information but, without the human context—why it matters and to whom—data can end up being just a lot of words and numbers on a PowerPoint® slide that ultimately will leave audiences with an abstraction that likely will not move them to action.

| National Rural Health Snapshot | Rural | Urban |
|---|---|---|
| Percentage of population | 19.3% | 80.7% |
| Number of physicians per 10,000 people | 13.1 | 31.2 |
| Number of specialists per 100,000 people | 30 | 263 |
| Population aged 65 and older | 18% | 12% |
| Average per capita income | $45,482 | $53,657 |
| Non-Hispanic white population | 69-82% | 45% |
| Adults who describe health status as fair/poor | 19.5% | 15.6% |
| Adolescents who smoke | 11% | 5% |
| Male life expectancy in years | 76.2 | 74.1 |
| Female life expectancy | 81.3 | 79.7 |
| Percentage of dual-eligible Medicare beneficiaries | 30% | 70% |
| Medicare beneficiaries without drug coverage | 43% | 27% |
| Percentage covered by Medicaid | 16% | 13% |

*All information in this table is from the Health Resources and Services Administration and Rural Health Information Hub.*

Source: https://www.ruralhealthweb.org/about-nrha/about-rural-health-care

**Stories without data**
and without evidence
can leave audiences
moved …
but moved to what?

# The Classic Story Structure

**Beginning**
- Once upon a time …

**Middle**
- This happened …
- Then this happened…

**End**
- And they lived happily ever after.

# Apply It to Our Story

**Challenge (Beginning)**
- We had a problem ...

**Solution (Middle)**
- We addressed it by doing this ... and this ...

**Results (End)**
- And now, more workers are ...

**Next ...**
- Here's how we can grow ...

# The Value of Your Success Stories



- Humanize the data
- Give credibility
- Create visibility
- Increase reach and impact
- Foster exchange of ideas
- Demonstrate the value of your work
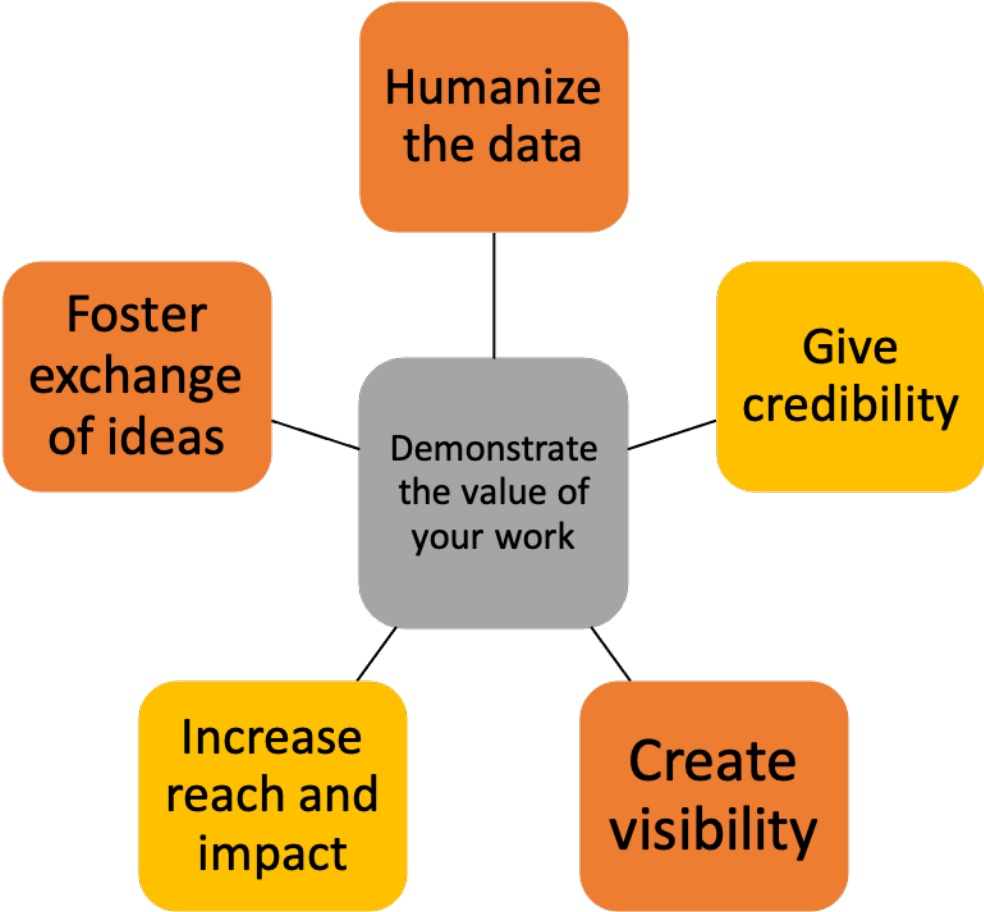
**Who?**

- Their priorities, needs, beliefs, values?
- How do they like to receive information?
- What data do they want and *need*?

**What?**

- Request more information
- Ask for a meeting
- Join the advisory group
- Decide to fund

**How?**

- Success stories
- Charts and graphs
- Infographics
- Public testimony
- One-on-one meetings

"3 bullets and a graph"

# Materials

- Fact sheets

- Briefs

- Presentations

- Success stories (text and video)

- Others?

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# Check-In:
# What are some of your successful materials?

# 3: Social Math

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& Sow

# How Social Math Works

Makes an issue relevant and urgent to an audience by comparing your data to familiar numbers around:

- **Dramatic events** — "More than the number of residents displaced by Hurricane Katrina"

- **Understandable costs** — "For less than the price of a cup of coffee each day …"

- **Current numbers from other issues** — "It's more than 10 times the number of people we lose each year to opioid overdoses."

**Social math doesn't "dumb it down." It crystalizes it.**

# Social Math: Find The Right Context

- Whom/what does it impact?

- What does it look like?

- How much money does it represent?

- How much time lost/gained does it represent?

- What resources does it use/save?

- Where can we place it?

**Comparisons must be made in real numbers—not percentages.**

**Trend: Physical Inactivity, California, United States**
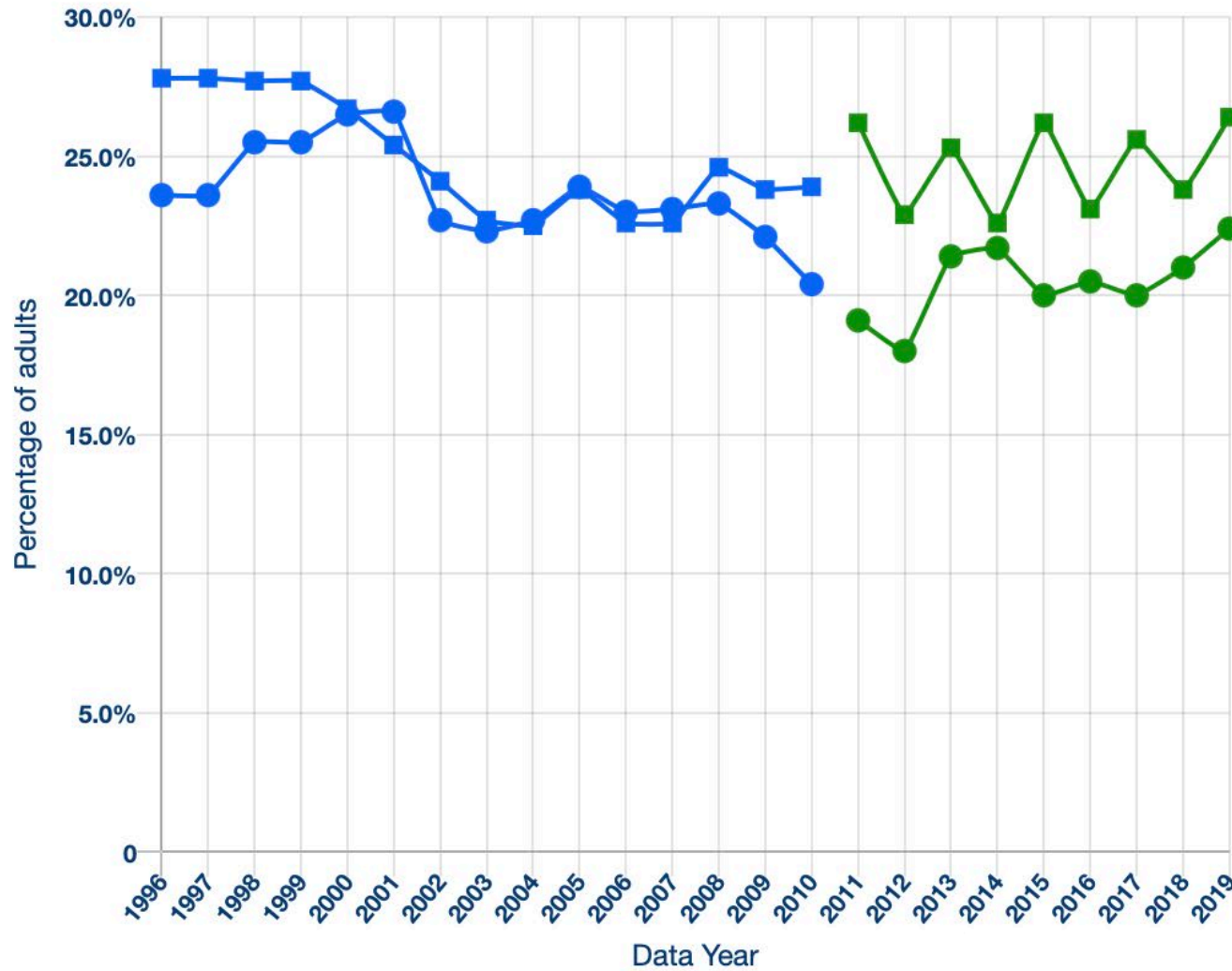
Percentage of adults who reported doing no physical activity or exercise other than their regular job in the past 30 days

● California   ■ United States

Source: https://www.americashealthrankings.org/explore/annual/measure/Sedentary/state/CA

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Almost one in four adults in California say they aren't physically active.

That's enough people to fill the Rose Bowl *more than 100 times*

# Let's Try It!



https://www.bls.gov/iif/oshwc/case/msds.htm#

# In 2018...

- **273,000 MSD injuries**
- **12 median days away**
- **3.3 million days (9,000 years) away from work**

# 3.3 million days lost

- Entire workforce of Washington State not working for a day*

- One worker not returning to work until … 11,021

- Seating capacity of all NFL *and* top 20 college stadiums, combined

# Check-In:
# What are some of your social math examples?

# Infographics: The Good, the Not So Good, and the ...?
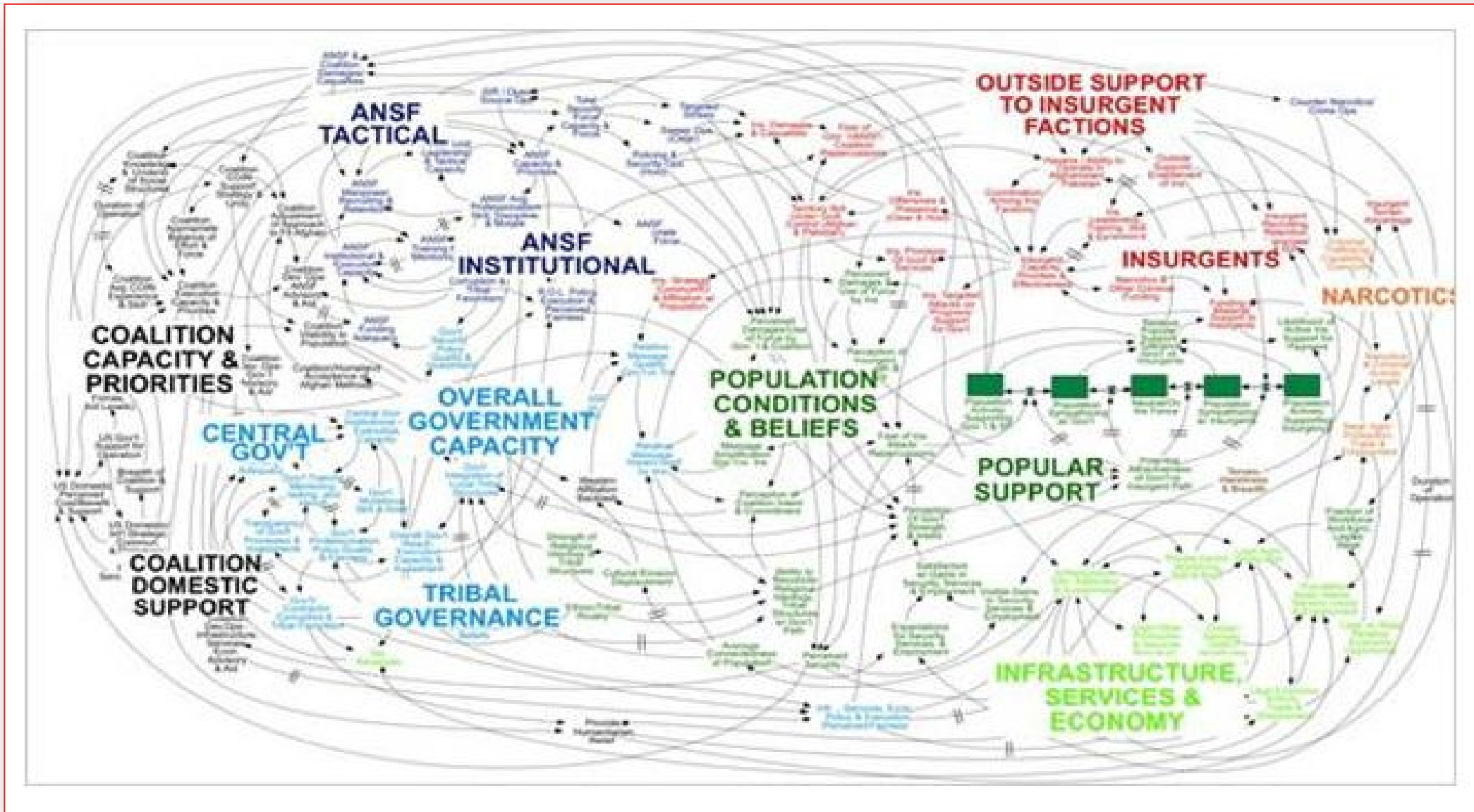
# Pros and Cons of Infographics

**Pros**

- Can translate complex data into easy-to-understand visuals

- Can be eye catching

- Easy to share (digitally, in print)

**Cons**

- Requires an understanding of design

- Data may not feel "human"

- Does not always tell the full story; data can be misinterpreted

# Anatomy of a Good Infographic

- Subject is clear

- Color palette and iconography are consistent

- Issue is clearly explained

- Graphics help define sections

- Deeper data give more credibility

- Summarizes key findings

- Offers a call to action

- Cites sources

- Includes contact info

No matter what data and math you use, consider these qualities



Informative
Simple
True
Data Presentation
Concrete
Emotional
Personal
Familiar
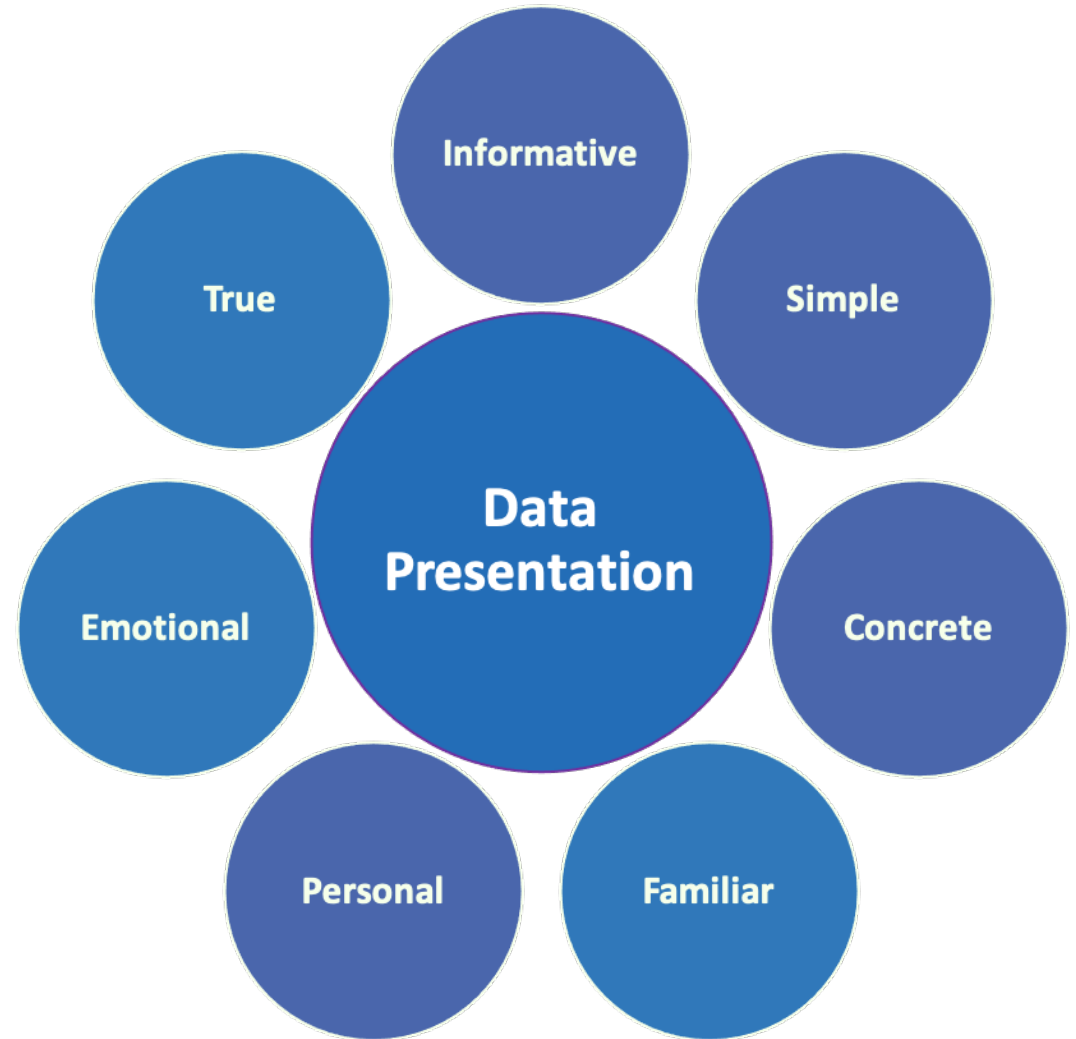
# Key Takeaways

- For most of us, data are abstractions that require meaningful context to be understood. Stories—visual and narrative—provide that context.

- Stories move our hearts. Data influence our minds. Together, they are more likely to move audiences to action.

- There are multiple ways to represent and communicate data at any point in grant funding. Our choices should be grounded in the preferences of our audiences.

# Questions?

# Resources

# RETAIN Project

- New Materials Planning Template
- ROC *Communications and Branding* Topic Page

https://retainta.org/course/view.php?id=2&section=10



**Materials Planning Template:**
**Who do you want to do what, and how?**

1. **WHO** do you want to reach (priority audience)?
   *What do you know about their priorities, needs, and beliefs? How do they like to, or typically, receive their information? What data do they need?*

2. **WHAT** do you want them to do (goal and objectives)?
   *What is your communication goal stated as a behavior (for example, "request more information," "ask for a meeting," "join the advisory group," and so on)?*

3. **HOW** should you communicate your data (channels, materials, activities, and partnerships)?
   *Infographics and data dashboard? Fact sheets, impact statements, and briefs? Presentations, public testimony, and elevator pitches? Success stories (written and video), Meetings and conferences?*

Cook & Sow

# RETAIN Project

- Program Communication Planning Template
- ROC *Communications and Branding* Topic Page

https://retainta.org/course/view.php?id=2&section=10



Program Communication Planning Template

# Thank you!
# patrick@cooksow.com

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# Thank you for your participation!

Please take a moment to complete this evaluation:
*https://www.surveymonkey.com/r/4_27_21-UsingData-PCook*

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