



Social Media and Subject Recruitment: How To Make It Work For You

DATE: February 28, 2019



## Agenda

- 1. Introduction of Speakers
- 2. Social Media & Marketing in Subject Recruitment
- 3. IRB/compliance Aspect of Using Social Media
- 4. Social Media Recruitment Experiences
- 5. Q&A
- 6. Wrap-up and Announcements



## Speakers

- Kathryn Peck
   Associate Director, Strategic Communications
- Megan Pugmire Creative Director, Strategic Communications
- David Holmgren, M.S. IRB Manager
- Jacob Lindsley Study Coordinator, Layton Aging & Alzheimer's Disease Center





## OHSU social media and brand

Tools for recruitment

DATE: FEBRUARY 28, 2019 PRESENTED BY: KATHRYN PECK, ASSOCIATE DIRECTOR; MEGAN PUGMIRE, CREATIVE DIRECTOR



## OHSU social media: we exist!

- We are a small but mighty team of four
- We are responsible for a number of accounts that include:
   OHSU, Knight Cancer Institute, Doernbecher, Brain Institute
- We also set up and manage paid campaigns for departments that don't have their own social presence
  - Even if you do have your own social channels, it may not make sense for those ads to come from you
- We support and advise others on how to best use their social accounts as well as meet with people who are looking to establish their own accounts



## How can social media support you?

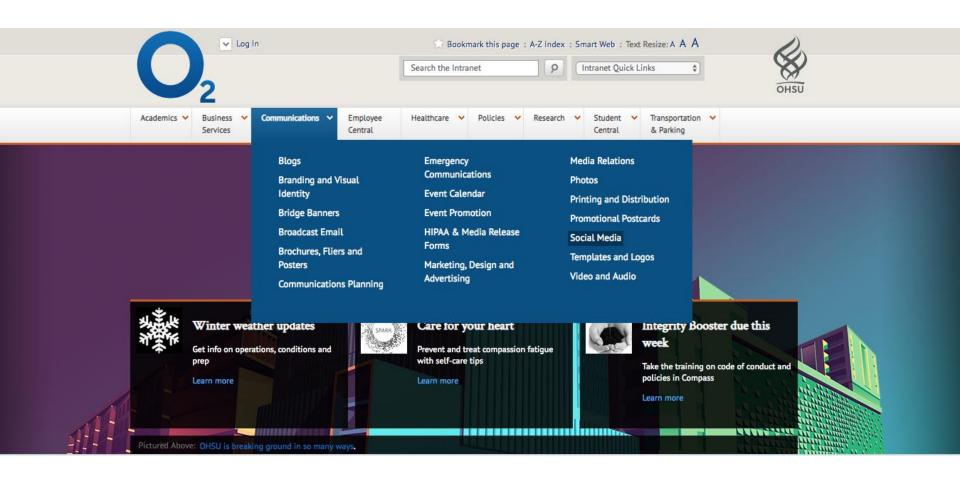
- A good first step is to visit the social media section on O2
  - Guidelines for using social, requesting a social media account, requesting a paid social campaign
- Aside from knowing that you need to recruit subjects for your study,
   you may not know what we can offer, or what will work for you
- We can advise on targeting, copy, creative, budget, ensuring your website is optimized for mobile
- Share analytics during and post-campaign



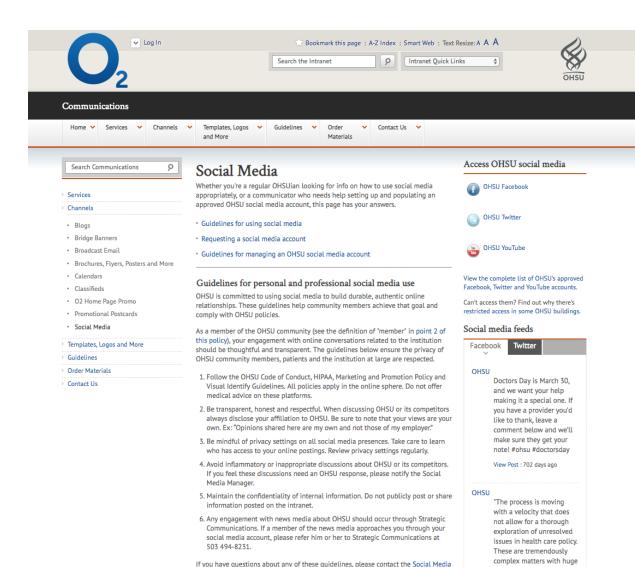
## Before you start

- A common issue that the social team encounters is when people come to us with a plan that is already IRB approved and seemingly baked
  - Please talk to us before you seek IRB approval as it will give us a heads up and we can help inform what should be included in this campaign (will save you from a lot of back and forth)
    - there are some constraints that are outside of our control (facebook targeting) but we can help you with this
  - Once you have an idea that you'd like to engage OHSU social media, please contact us either through the form on O2 or by email <a href="mailto:Socialmedia@ohsu.edu">Socialmedia@ohsu.edu</a>
  - You're going to need budget
  - o Just because IRB approves something doesn't mean that it's possible













Are you, or a senior you know, looking for more opportunities to connect with others? A healthy social life can have a positive impact on memory.

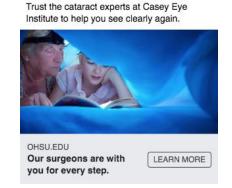


LEARN MORE

Find out how to join this

video chat study.





Oregon Health & Science

University (OHSU)

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•••



Study on Mom & Baby Well-Being seeking

participants

Researchers want to learn if mindfulness groups can help support maternal and infant well-being during pregnancy and postpartum.



Learn More



Oregon Health & Science University (OHSU)

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## **OHSU** brand strategy

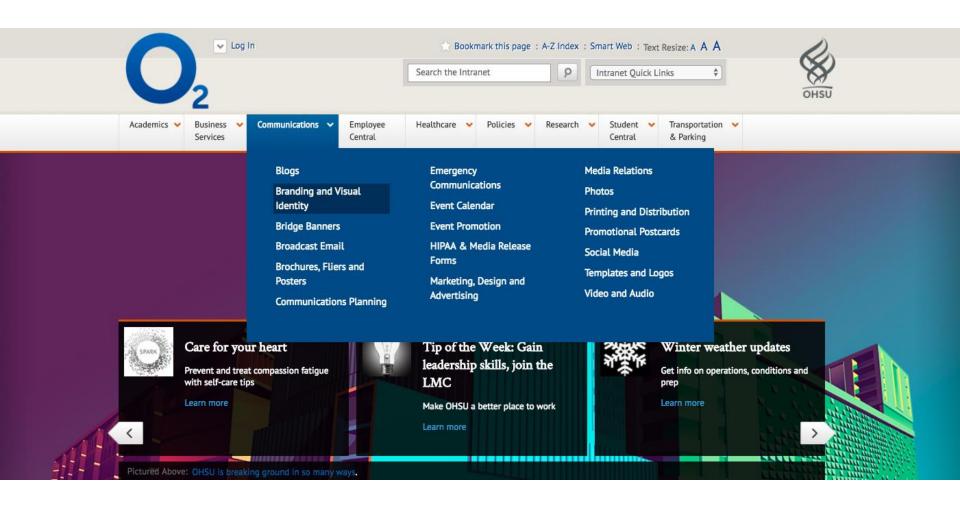
- We are a small but mighty team of three, along with a group of external vendors (writers, designers, photographers and video production teams) well-versed in our brand.
- We establish, refine and implement guidelines, focusing on clarity, consistency and integrity of the OHSU brand.
- We create large strategic creative marketing campaigns as well as various other individual projects



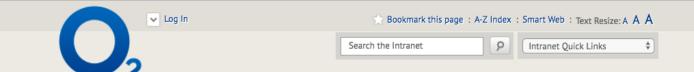
## How can brand strategy support you?

- Brand guidelines (O2 > Communications > Branding and Visual Identity)
- Template portal ( > Templates, Logos and More > Templates)
- OHSU copy center Daniel McClintick
- Fee-for-service program (> Services > Marketing, Design and Advertising,
   Graphic Design Assistance > Creative Services Request Form on Bridge)
- Approved external vendor list (Approved External Graphic Design Vendors)
- pugmire@oshu.edu





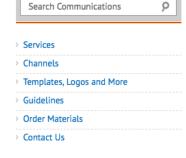






#### Communications

Home 💙	Services	~	Channels	~	Templates, Logos	~	Guidelines	~	Order	~	Contact Us	•
					and More				Materials			



### Branding and Visual Identity

A brand is the collected experiences and associations people have with an organization.

At OHSU, our brand is communicated through the materials we use to reach customers and the public; through our interactions with customers (by phone, website, ads, events, social media, facilities and clinics); and every encounter people have with us.

A strong brand can:

- \* Build customer loyalty and support
- · Differentiate us from the competition
- \* Define who we are as an organization
- \* Enhance the value of our products and services
- Motivate employees and stakeholders

That's why it's important we're all on the same page about what OHSU is and does. This site provides the resources you need to be an active part of promoting the



#### Branding resources

- Visual Identity Guidelines
- Logos
- Templates
- Photos
- Messaging
- Typography





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· Appointment Cards

Letterhead

Brochures

• #10 Envelope

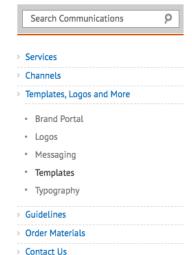
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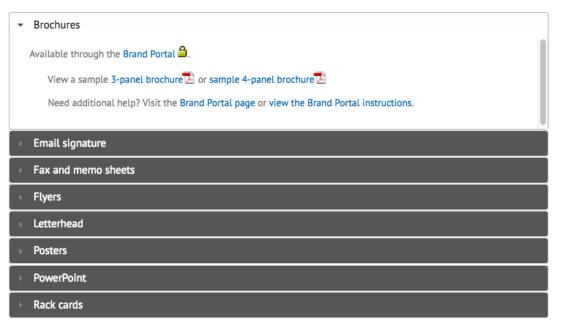




### **Templates**

Looking for a template that you're used to using? Some of them are being tested in a new online format that allows you to put your text into a pre-designed template you can either print or save for free as a PDF.

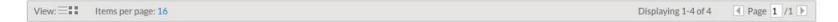
The Brand Portal provides pre-designed OHSU templates that you can put your text and photos into, then either print, or for some template types, save as a PDF.





Home . Catalog . Flyers

# FLYERS





Customize 🖸





Customize





Search Communications

#### > Services

- · Photography
- · Marketing, Design and Advertising
- · Writing and Editing
- · Communications Planning
- Media Relations
- · Printing and Distribution
- Channels
- > Templates, Logos and More
- > Guidelines
- Order Materials
- Contact Us

### Marketing, Design and Advertising

Welcome to your O2 home for information on marketing, copywriting, graphic design, advertising and photography/videography resources and guidelines here at OHSU.

#### What do you need to get done?

▼ I'm interested in graphic design assistance

Self-Service Templates: If you need to create a project like a rack card, tri-fold brochure, poster, or flyer, try the Template Portal, which provides pre-designed OHSU templates. OHSU has partnered with Stevens Integrated Solutions for you to develop and receive these materials in about 5-10 business days at market competitive printing fees. The Template Portal also allows users to create PDFs at no cost to the user to share electronically or print on an OHSU color printer.

OHSU Copy Center graphic design staff offers primarily print design (flyers, posters, booklets, etc.). The copy center offers a variety of copy and custom printing options as well. Graphic design rates start at \$40 an hour. Submit a work request or learn more on the Copy Center O2 page.

OHSU Marketing and Communications offers expert knowledge of the OHSU visual identity and provides a variety of design services for direct mail, print advertising, event invitations and materials and print collateral (booklets, reports, etc.) to name a few. Graphic design rates start at \$75 an hour. Please submit a creative services request form and a team member will get back to you.

External graphic design vendors: As an alternative to our Marketing and Communications team and the Copy Center, there are approved external graphic design vendors who are on a contract with OHSU. Contact Marketing to get a referral to one of our approved graphic design vendors. Graphic design rates start at \$60 an hour.

#### Contact us

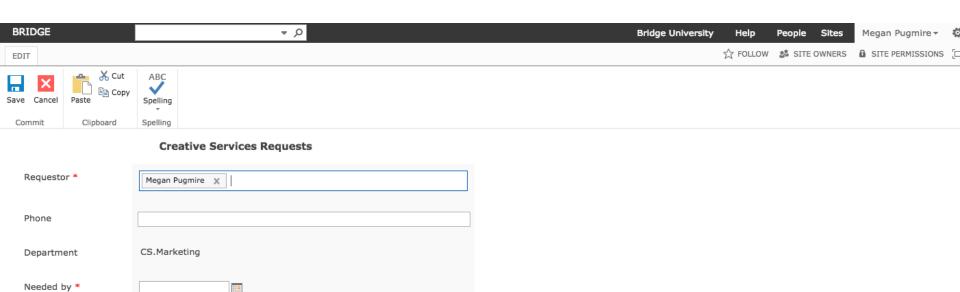
Submit the creative services request form

Email Marketing for a referral

#### Resources

- · Visual Identity Guidelines
- . Top 10 Style Guidelines
- Logos
- · Boilerplate messaging
- Templates
- Photos
- Videos
- · Approved external vendors





What do you want

Describe your project

help with? \*

Budget \*

Please select a value...

Please select a value...



	CONTACT INFO AND PORTFOLIO	RATES	STRENGTHS	BIO			
GRAPHIC DESIGN							
Charlotte Woodward CW Design	cwdesign@hevanet.com 503-684-4990 http://cwdesign.portfoliobox.net/	\$75/hr	Complex charts and reports Infographics Multi-page layouts Templated production Photo shoot art direction Patient education materials	Hi there, I'm Charlotte. I have extensive experience in graphic design and a passion for all things printed. Design is fun and I enjoy each new project. My creative design solutions are informed by years of work for health care, educational and other nonprofit customers. Feel free to have a look at my portfolio and don't hesitate to contact me if you think I can be of service to you.			
Dean Donohue (see also listing in writing)	prdean@gmail.com 541-513-0443 http://www.deandonohoe.com/	Graphic designer: \$150/hr Production designer: \$100/hr Art direction: \$150/hr Production manager: \$75/hr Project manager: \$75/hr	Multi-page layouts Photo shoot art direction Environmental graphics Vector-based illustration Traditional illustration Vector icon creation	Dean Donohoe is a creative studio. We've built digital publications, visual identities, commercials, print pieces, websites, music videos, interior spaces and many other things. We partner with cultural institutions, non-profits, artists and companies to make unique, elegant and unexpected work. We go deep on everything, so we only do work we believe in. We're Tess Donohoe, a designer, illustrator and painter, and Peter Dean, a writer, composer and cat lover.			
Dojo Agency (see also listing in writing)	jeff@dojoagency.com 503-784-1449 http://dojoagency.com/#portfolio	Graphic designer: \$130/hr Production designer: \$120/hr Art direction: \$150/hr Production manager: \$130/hr Project manager: \$120/hr Or flat per project rate	Complex charts and reports Infographics Multi-page layouts Templated production Photo shoot art direction Patient education materials Ervironmental graphics Vector-based illustration Vector icon creation	Dojo Agency is unique in that we are a team of seasoned marketing communications professionals who will roll up our sleeves to work alongside partners and clients. We began in 2009 in service to Portland brands. From the start, Dojo Agency has focused on brand and campaign development work in health care. We speak to health care's numerous audiences, including physicians and hospital networks, individuals who need guidance, access and education, and employer groups in marketing for health insurance and health-outcome related services.			
Todd Skiles Fullblast Creative	todd@fullblastcreative.com 503-227-2002 http://www.fullblastcreative.com/our- work	Graphic designer: \$90/hr Production designer: \$75/hr Art direction: \$90 /hr Production manager: \$75/hr Project manager: \$75/hr Or per-project flat rate	Complex charts and reports Infographics Multi-page layouts Templated production Photo shoot art direction Patient education materials Erwironmental graphics Vector icon creation	Down-to-earth Colorado boy. Worked in the music industry in Manhattan. Fell for Portland. Learning about Health Literacy left me truly inspired. I've experienced the need while caring for my parents. It turns any project [online form, patient handout] into a critical piece. I design with purpose:  - I listen, ask questions and deliver options with a clear, concise message  - You [enthusiastically] select the winner  - I get results [over 10 referrals from one client] Together we connect, engage and inspire our audience to: donate, share [like], or understand a form and fill it out easily/correctly.			
Sally Heppner Design	hepcats3@comcast.net 503-789-9618 http://www.sallyheppner.com	\$90/hr or per project flat rate	Complex charts and reports Multi-page layouts Templated production Patient education materials	My approach to design is to make every word and image prove why they deserve attention. I strip down, lay bare, and put each to the test. No one is allowed on the page who shouldn't be there. Then I assign places. Who gets the most attention on this page? Who is next? I pay just as much attention to the spaces between; these help draw attention to those who have passed my test.  The result? Elegantly clear communication.			
Hub Collective jen@hubltd.com 503-222-0165 http://www.hubltd.com		Graphic designer: \$125/hr Production designer: \$95/hr Art direction: \$150/hr Production manager: \$115/hr Project manager: \$115/hr Copywriter, brand strategist: \$135/hr Or per project flat rate	Complex charts and reports Infographics Multi-page layouts Templated production Photo shoot art direction Vector-based illustration, Traditional illustration Vector icon creation	HUB is a design studio fueled by a passion for endearing your audience to your brand. We help our clients raise awareness, expand their reach, inform and engage through new and innovative approaches. For 12 years we have collaborated with organizations to conduct research, develop branding, launch campaigns and design collateral for various audiences such as health advocates, consumers, prospective students and more. Our small and mighty team is comprised of strategists, designers and project managers who feel that through true collaboration and respect we can create authentic, impactful design solutions.			





# Thank You





# Social Media in Clinical Research: IRB Considerations

David Holmgren, MS IRB Manager





Pathways to Approval

### Draft Materials

- OHSU approved templates
- IRB Advertising standards



Strategic Communication n Approval



OR

### **IRB** Approval

- Not unduly influential
- Doesn't imply 'treatment'
- Balance of risks/burdens and benefits
- Does not promise free medical care



### Strategic Communication n Approval of IRB Revisions

• (if needed)

ANY additional revisions will need IRB reapproval via a Modification

### Draft Materials

- OHSU approved templates
- IRB Advertising standards



### IRB Approval

- Not unduly influential
- Doesn't imply 'treatment'
- Balance of risks/burdens and benefits
- Does not promise free medical care



Strategic Communication Approval



# IRB Approval of Strategic Communication s Revisions

Always Required!

# Does IRB review change when Social Media is used in research?

## No....The same considerations and standards apply!

- The IRB ensures human subjects protection are in place. The IRB reviews advertisements and recruitment material for such things as...
  - Undue influence? For example:
    - Inappropriate focus on payment
    - Stating treatment vs. research
    - Promising/implying benefits beyond approved protocol
    - Conveying safety or effectiveness (since that is being studied in the research)
  - Accuracy (and not misleading)
  - Privacy and Confidentiality
- Essentially, the IRB conducts its review of social media-based protocol activities similar to more traditional methods.



# When using social media in research studies, your IRB protocol must have a thorough plan addressing...

- Obtaining initial IRB approval *and* approval of all content updates
- Vetting all communications for appropriateness, including whether potentially upsetting or stigmatizing to individuals or groups
- How social media interactions by study teams, subjects and others will be monitored including user-generated content
- Reporting of AEs, protocol deviations/non-compliance, unanticipated problems directly to study team (not via social media platform)
- Partial HIPAA WoA if any Protected Health Information (PHI) is collected before written authorization (screening...)
- Confidentiality and security of posted and any collected information (?Security Review)
- Other issues...



# What may NOT need to be submitted for IRB review? A few examples...

- Study-specific information *only* limited to basic trial information such as title, purpose of study and study locations (i.e., Clinicaltrials.gov)
- Newsletters or articles already publicly available
- 3<sup>rd</sup> party postings not under researchers control
  - However, researchers must be aware of, and monitor anything posted on study-specific locations
- Communications between health professionals (such as MD to MD letters)
- May be other examples...



# What DOES IRB need to review? Some examples (not all inclusive)...

- Complete description in protocol of use of:
  - Recruitment including all methods proposed
  - Specific Social Media platform (i.e., Facebook, LinkedIn...)
  - Use of text messaging
- Recruitment Materials (must be final versions, must be 'hard copy' to document the IRB's review for auditing)
  - Websites, YouTube...
    - Include all interactive content, pop-up windows, etc.
  - Facebook pages
  - Social Media Posts (Facebook, Twitter...)
  - Audio scripts, audiofile if available
  - Final video files
- Any modification to any of the above!





## Questions?

Contact the IRB at <u>irb@ohsu.edu</u> or call the Integrity Dept: 503-494-7887.

THANK YOU!

David Holmgren IRB Manager

Email: <a href="mailto:holmgred@ohsu.edu">holmgred@ohsu.edu</a>



## Social Media Recruitment Experiences

Jacob Lindsley

Layton Aging & Alzheimer's Disease Center



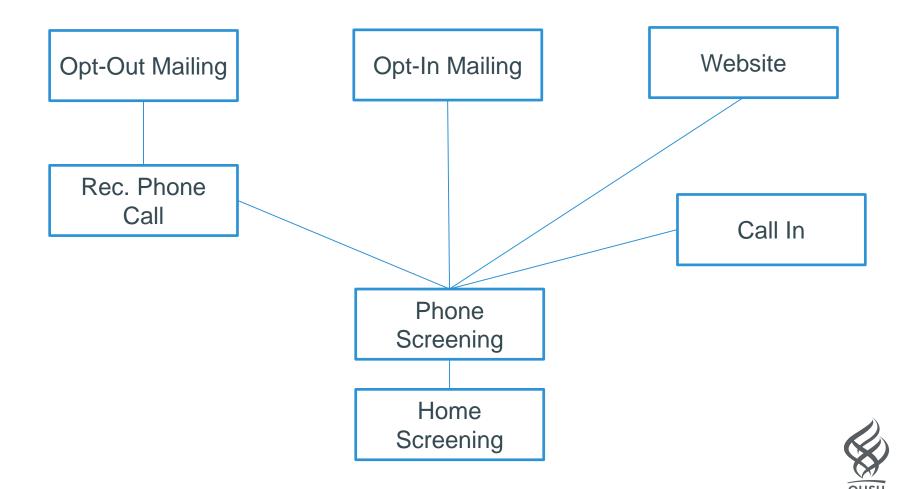
## **I-CONECT Clinical Trial**

- "Internet-based conversational engagement clinical trial"
- 1 year, bx tele-health intervention for seniors 75+
  - Cognitive testing
  - MRI
  - Linguistic & Genetic Analysis
  - -N = 288





## I-CONECT Recruitment



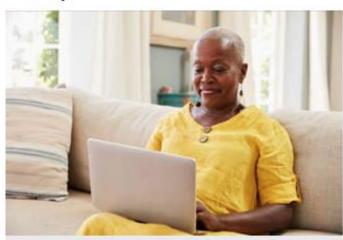
## I-CONECT Ads



### Oregon Health & Science University (OHSU)

Sponsored · @

Are you, or a senior you know, looking for more opportunities to connect with others? A healthy social life can have a positive impact on memory.



### OHSU.EDU

Find out how to join this video-chat study.

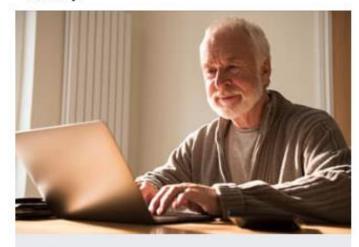
LEARN MORE



### Oregon Health & Science University (OHSU)

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Are you, or a senior you know, looking for more opportunities to connect with others? A healthy social life can have a positive impact on memory.



### OHSU.EDU

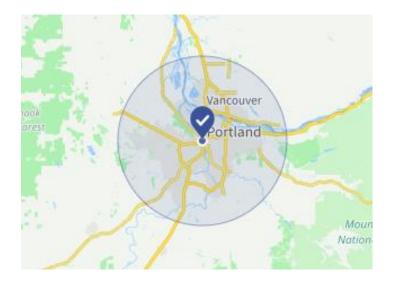
Find out how to join this video-chat study.

LEARN MORE



## I-CONECT Ads

- Men and women
- 20m radius from Portland.
- Ages of 35 and up.
- Interests:
  - Healthcare
  - Higher Ed
  - Nursing
  - Nursing Home Care
  - Family
- \$200 spending limit

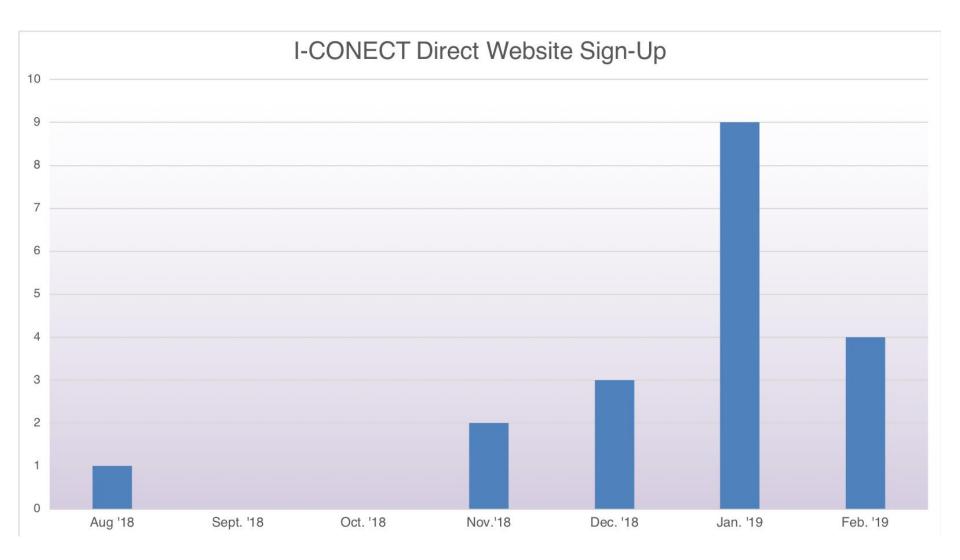




## I-CONECT Ads

- 22,353 people reached
- 641 people have clicked on the ads (3%)
  - + \$.31 cost per click
- 111 Engagements
- Of those who have clicked on the ads, 95% have been women
  - Of that group, 60% have been women over the age of 65







## Questions & Answers





## Wrap Up & Announcements



## **Announcements**

## Newest Recruitment Toolkit Documents are Available Online!

- Social Media & Research
  - Best practices and strategies for using social media as a participant recruitment method

### Social Media & Research:

Participant Recruitment Tips & Tricks





## **Upcoming Events**

For other upcoming events, stay tuned for announcements in future editions of CRU news.

Don't receive CRU News, email <u>OHSUCRU@ohsu.edu</u> to be added to the listserv.

For more information on OCTRI Recruitment Services, additional resources, or to request a recruitment consultation, please email <a href="mailto:octrirecruitment@ohsu.edu">octrirecruitment@ohsu.edu</a> or visit our website at <a href="https://www.ohsu.edu/octri">https://www.ohsu.edu/octri</a>



## Additional Resources

### **OHSU Social Media & Marketing**

https://o2.ohsu.edu/communications/channels/social-media.cfm

Email: socialmedia@ohsu.edu and branding@ohsu.edu

### **OHSU IRB**

https://o2.ohsu.edu/integrity-department/research/human-subjects/index.cfm

Email: <u>irb@ohsu.edu</u>

### National Institute of Health (NIH)

https://www.nih.gov/health-information/nih-clinical-research-trials-you/guidance-regarding-social-media-tools

### **Recruitment Innovation Center (RIC)**

https://trialinnovationnetwork.org/recruitment-innovation-center/



# Thank You