

**CALIFORNIA DEPARTMENT OF PUBLIC HEALTH
OFFICE OF PUBLIC AFFAIRS
POLICIES AND PROCEDURES
-SOCIAL MARKETING-
2011**

OPA ROLE:

The Office of Public Affairs (OPA) is responsible for the overall communications and outreach activities of the California Department of Public Health (CDPH). OPA develops and executes public affairs strategies to support the goals and objectives of the Department.

OPA is the principle liaison for the Department's outreach and education programs. The office works with program staff and media campaign contractors to plan CDPH major media and social media campaign strategies, messages, materials and events. OPA provides ongoing consultation and technical assistance to facilitate the official approval process.

I. CDPH SOCIAL MARKETING REVIEW AND APPROVAL PROCESS

A. Major Media Ads (Radio/TV/Videos/Print):

OPA, the Director's Office (DO) and, when required, the California Health and Human Services Agency (CHHS) will review and approve all CDPH paid media campaign advertisements or unpaid public service announcements (PSAs) intended for television, radio, online and print media from the concept to final stages. The originating program's Center deputy director will review and approve all documents described below prior to submission to OPA:

- **Concepts (TV only):**

A concept is a short paragraph that describes the storyline of a TV ad.

A [Director's Action Requested \(DAR\)](#) is used to submit campaign concepts for the Director's approval via OPA. A briefing meeting may be scheduled with OPA and the DO to review initial concepts and obtain approval. If concepts are sensitive or controversial, additional approval may be required before further development begins.

- **Scripts/Storyboards (TV/Radio/Videos):**

Scripts/storyboards (written and pictorial execution of the ad concept) are required for TV and radio ads/PSAs and those videos intended for mainstream broadcast, website or cable media.

A [Secretary's Action Requested \(SAR\)](#) is used to submit scripts/storyboards for OPA/DO and external review and approval. OPA will facilitate the external review of advertising scripts and storyboards.

- **Final TV/Radio Ads/PSAs/Videos:**

A **SAR** is used to submit final TV and radio ads/PSA/and those videos intended for mainstream broadcast or cable media to OPA for approval. OPA will facilitate the external review and approval for release.

- **Print ads:**

Mock-up versions of all print ads/PSAs appearing in newspapers, magazines online ads, billboards/busboards, or out-of-home materials, shall be submitted to OPA via a **DAR** for approval before production.

A **SAR** is used to submit final print/online ads to OPA.

Focus Groups:

Focus group testing is required for all new TV/radio advertising and should occur before script/storyboards are submitted for initial review. OPA should be advised of upcoming focus group sessions and the OPA deputy director and/or designee may attend focus group sessions. In addition, when submitting ads for review, program should include a focus group summary of the ads that have been selected. The full focus group report is not required.

B. Collateral Materials:

- Collateral materials include posters, brochures, fliers, mailers, handouts, and other items intended for public or media distribution.
- Forward all proposed collateral materials to OPA for review and approval prior to production and distribution. Non-sensitive material should be submitted to OPA with a **DAR**. Sensitive material should be submitted to OPA with a **SAR**. (See page six-eight of the CDPH [Document Review & Approval Guidelines](#) on the intranet for a definition of sensitive and non-sensitive documents.) All health education/communications- material that meet one or more of the criterion listed in that section require approval by OPA, and the Director as appropriate, prior to release. Sensitive documents may also require review and approval by CHHS and the Governor's Office. The Director will determine the need for such approval.
- If there is a question about the need to approve certain items, please feel free to contact OPA at 916 440-7259 for direction.

OPA will be provided with two copies of all final television, radio, print and social media ads, and one copy of all collateral materials, enclosed with the approval documents.

C. Social Media/Social Networking Sites:

The use of social media tools such as Facebook, Twitter, YouTube and other

websites are an excellent resource to further enhance CDPH program outreach and education.

1. **Facebook:** Facebook is a [social networking site \(SNS\)](#) where users create a personal profile, add other users as friends, and exchange messages, photos, videos or links and can get an automatic notification when friends update their profile. As of July 2011, Facebook has more than 750 million active users.

CDPH has a Facebook page to communicate department news and motivate individuals to lead healthier lives. A maximum of 420 characters (including spaces and punctuation) is allowed. CDPH programs are encouraged to compose their own messages, including links, photos or videos. OPA staff is available to help craft messages and discuss how Facebook fits into a program's communication strategy.

PLEASE NOTE: Programs must receive approval from OPA to establish its own Facebook page. Please contact OPA for more information.

2. **Twitter:** Twitter is a short messaging service characterized by its 140-character limit. Messages can include links to websites, videos and photos. Programs are encouraged to compose their own messages ("tweets") they want distributed. OPA staff is available to provide training in how to compose the messages. OPA may make edits before sending out the tweets. Programs are responsible for tracking the effectiveness of their tweets.

PLEASE NOTE: Programs must receive approval from OPA to establish their own Twitter accounts. Please contact OPA for more information.

3. **YouTube/Vimeo:** YouTube and Vimeo are video-sharing services that provide programs a place to store videos (generally 15 minutes or shorter) and a URL that can be shared electronically. **For details, see the section I-D below, *CDPH Videos: You Tube/Vimeo.***

PLEASE NOTE: Programs must receive approval from OPA to establish its own YouTube channel. Please contact OPA for more information.

4. **Program Websites:** All CDPH-produced or -funded websites must be approved by OPA before going live. Please submit the suggested website content to OPA for approval via an email to the designated OPA social media contact person listed on the intranet OPA homepage.

PLEASE NOTE: Programs must receive approval from OPA to establish its own website. Please contact OPA for more information.

a. CDPH Internet/intranet Website Guidelines:

Internet and intranet website guidelines for style, formatting and

navigation can be found in the [CDPH Web Publishing Guide](#), which is created and monitored by the CDPH Web Services Group (WSG).

The content area (the area that does not include navigational links or tabs) of the Internet and intranet home pages are managed by OPA. Programs are encouraged to contribute suggestions for content.

Programs are responsible for the content on the own pages, within the context of WSG guidelines.

- **CDPH Social Media Site Advance Approval:**

- **OPA Approval:** CDPH requires that all CDPH social media communications via Facebook, Twitter, YouTube, websites or other social networking sites be submitted to OPA for advance approval before going live. Links to websites and photos can be included with the post.
- **Approval Process:** Send all your social media requests for approval via an email with suggested content to the designated OPA social media contact person as listed on the intranet OPA homepage.
- OPA is responsible for posting all social media items to the Internet. OPA may make final edits as necessary.
- OPA is available to advise programs how to create posts and will work with programs to ensure the posts are consistent with CDPH messaging.
- All CDPH employees and social media projects must follow the [CDPH Social Networking Guidelines](#) outlined on the CDPH intranet under Forms and Publications.
- To learn about CDPH policies for using social networking tools and websites, please read [these guidelines from the CDPH Information Security Office](#). Programs interested in using these tools should read [OPA Social Marketing Tips](#) before contacting OPA.

D. CDPH Videos: You Tube/Vimeo

YouTube and Vimeo, CDPH's video-sharing websites, provide programs a place to store videos (generally 15 minutes or shorter) and a URL that can be shared electronically.

Videos will be reviewed by OPA prior to posting. All videos must include the CDPH logo. Programs must provide OPA the video, a brief description of the video (including a reference to CDPH), tags for the video and indicate whether they want the video viewable by the public or restricted to those who have the video's URL. Programs can also have their videos grouped on YouTube in playlists.

- **CDPH Video Approval:**
 - A CDPH program video intended for YouTube or a website posting requires OPA approval before production and release.
 - A **DAR** is used to submit the video script/storyboard to OPA for approval. If subject is sensitive or controversial, further approval may be required before production begins.
 - A **DAR** is used to submit the final video for OPA approval to post. If subject is sensitive or controversial, further approval may be required before release.
 - A **SAR** is used to submit the final video if it is intended for mainstream broadcast or cable media. If the Director provides final approval, the Director will sign the SAR and return it to OPA for program notification.

OPA is available to assist the program in development and production of videos.

II. BRANDING CDPH SOCIAL MARKETING MATERIALS

All CDPH-produced or -funded materials are to be branded with the CDPH name and logo.

Please review the following link for instructions on logo use: [Guidelines on the use of CDPH logo and the official State seal](#)

Branding Guidelines:

A. MAJOR MEDIA ADVERTISING requires that the following tag lines be used for all media campaign advertising. These tags are required for materials that were produced internally or through CDPH-funded programs:

- Paid Television and Radio
 - 1) "Sponsored by the California Department of Public Health."
 - 2) "Sponsored by the State of California." (For campaigns that include funds from another state agency.)

- Public Service Announcement (PSA) Television and Radio
 - 1) Brought to you by the California Department of Public Health."
 - 2) "Brought to you by the State of California." (For campaigns that include funds from another state agency.)

B. VIDEOS/WEBSITES

All CDPH-produced or -funded videos and websites shall contain the CDPH name and logo. Individual program names/logos may be included as appropriate.

C. COLLATERAL MATERIALS

The CDPH name and logo is required on all CDPH-produced or -funded print materials including brochures, posters, fliers and handouts. State and program names/logos may be included as deemed appropriate. Any union and recycle bugs should also be displayed. Questions on this requirement should be directed to OPA.

III. MEDIA AND NON-MEDIA EVENTS

A. MEDIA EVENT:

OPA will work with program staff and media campaign contractors in developing, coordinating and executing all media or social marketing events involving the Governor, First Lady, Secretary and Director, and will serve as the liaison between program staff and the offices of these officials. OPA will be involved in suggesting event themes, messages, participants, sites and follow-up activities. All final decisions will be subject to OPA approval.

A **DAR** is used to invite the Director to a media or social marketing event. It should be noted that a DAR to OPA is *not* needed to invite the Director to a non-media event, such as a meeting or conference., If you are inviting the Director to a non-media event, a memo from the Center Deputy Director may be forwarded directly to the DO providing the details and date.

A **SAR** is used to invite the Secretary to a media, social marketing or a non-media event, meeting or conference. The SAR should be routed through your program's approval process to OPA.

When preparing a DAR, SAR or memo for a media event, relevant details should be added to the package under the following headings: Event; Date/Time; Location; Format; Speakers; Materials; Press; Other Participants.

To invite the Governor and/or First Lady to an event, a [Governor's Office Action Requested \(GOAR\)](#) form as well as an attached "Event Overview Sheet" that describes your event. The GOAR provides the request and background information and is addressed to the name of the Governor's current Cabinet Secretary. The Event Overview Sheet is a Word document composed by program to provide specific event details including the date, time, duration, location, participants, logistics, contact person and visuals. Upon approval, a proposed event agenda will be requested.

Please note that a separate GOAR is required to invite both the Governor and First Lady to the same event - one addressed to the Governor and one to the First Lady.

B. NON-MEDIA/ NON-SOCIAL MARKETING EVENTS:

The **SAR** and **GOAR** are also used for non-media or non-social marketing requests, such as Secretary/Governor's correspondence, special reports,

products and various legislative items. These transactions do not need to go through OPA. Instead, submit the GOAR directly to the DO. In the case of a legislative report regarding a media campaign, submit the GOAR to CDPH's Office of Legislative and Governmental Affairs with a copy to OPA.

A **DAR** to OPA is *not* needed to invite the Director to a non-media/non-social marketing event, such as a meeting or conference. Instead, if you are inviting the Director to a non-media event, a memo from the Center Deputy Director may be forwarded directly to the DO providing the details and date.

OPA will assist in the development and transmittal of media DARs, SARs and GOARs. OPA will work with program staff and contractor(s) to ensure that all necessary advance work for events involving the Governor, First Lady, Secretary or Director is coordinated and completed.

Unless otherwise stipulated by OPA, program and their contractor(s) will be responsible for coordinating event arrangements, including technical materials, site personnel, photographer, media access and site preparation.

OPA will review and approve all press event materials (i.e., media advisories, press releases, fact sheets, press kits, minute-by-minute agendas, talking points) drafted by the program or contractor for media events. OPA will also facilitate the forwarding of these materials to appropriate press event participants. All media advisories and press releases will be distributed by OPA on CDPH letterhead, unless otherwise stipulated by OPA.

If a contractor is used, they may be responsible for notifying the media about CDPH events as stipulated by OPA and will work with OPA in coordinating event follow-up activities such as arranging post-event interviews with the media.

Program staff will forward a summary of media coverage of an event, any newspaper, or broadcast clips generated to OPA within one week after the event. Should additional information become available after this time, program staff will forward an update to OPA.

IV. OTHER OPA-APPROVAL DOCUMENTS

A. Governor's Proclamations:

A **Governor's Office Communications Action Requested (CAR)** is used for all proclamations, welcome letters, gubernatorial commendations or recognition requests. The CAR should describe specifically what approval is requested and the deadline. The suggested language should be attached to the CAR form ([CDPH 1056](#)) (found on the [CDPH intranet page](#) under **Forms**). A CAR requires eight to 10 weeks for approval. Be sure to build in advance time to achieve approval in time for the occasion.

B. Press Releases/Media Advisories:

Press releases, media advisories and speaking points do *not* require a DAR/SAR. Upon Center Deputy approval, these items may be sent directly to OPA for processing via a memo or email. See OPA's [Media Relations](#) procedures for specific information.

If program is unsure of the document to use for an activity, see **“WHEN TO USE DARs, SARs, GOARs and More”** at the end of this document or contact OPA for assistance and examples.

V. REQUEST FOR PROPOSAL (RFP) PROCESS

At the initial stage of developing a social marketing campaign, the program shall conduct research to support a campaign strategy that could target specific populations with key messages. A **SAR** document outlining the campaign's rationale, as well as the scope of the campaign, must be submitted to the OPA for review and approval. As deemed appropriate, an external briefing may be scheduled with the California Health and Human Services Agency.

Request for Proposal (RFP):

The OPA Deputy Director and/or designee shall review and approve all draft and final RFPs generated by CDPH programs for advertising and public relations media campaign contracts before they are released. A **SAR** will be used to submit the draft RFP to OPA for approval. The Office of Legal Services and Contracts Management Unit should conduct their review process in conjunction with OPA. External approval will be facilitated by OPA. As deemed appropriate, a briefing may be scheduled with the California Health and Human Services Agency.

The OPA Deputy Director and/or designee may participate in informational meetings and bidders conferences conducted as part of the contract procurement process.

The OPA Deputy Director and/or designee shall serve as a voting member of the evaluation panel for all media campaign RFPs. This participation may apply to the evaluation of technical proposals and oral presentations.

VI. FORM COMPLETION

Copies of the DAR, SAR, CAR and GOAR forms can be found on the [CDPH intranet](#) page under Forms.

These forms should follow the standard format as outlined on the intranet. The content should follow the specific document headings and describe specifically what approval is being requested and the deadline. OPA asks that the document package be a limited to a *two-page summary* and include:

- A description of the campaign product or event attached for approval;

- The anticipated impact of the product or event;
- The overall campaign objectives and target audience;
- How the product or event fits into the overall campaign;
- Focus group findings, if applicable;
- The time factor, including details on specific deadlines or due dates and an explanation of any urgency in approval ("as soon as possible" is not an acceptable time factor).
- Estimated cost of the product or event;
- Any effect on existing state law < if not applicable, indicate "N/A"; and
- An event overview sheet should be attached to a GOAR (see Section V).

Program may include separate attachments to the document that provide more detailed background information, if needed.

A "Table of Contents" page listing all of the submitted ads (title, medium, and target) should be included with an ad campaign package.

All proposed scripts, storyboards, print ads, rough cuts, collateral materials and other deliverables or products must be attached to the document when submitted by program to OPA. Additionally, a list of all ads produced during the current administration should be attached. **A disk or USB flash drive with all pertinent documents must also be included.**

OPA will return all documents that use an incorrect format or are missing required information. If external reviewers request programmatic changes, OPA will notify program of the requested changes, which will be revised and resubmitted. Any questions about the document process should be directed to OPA.

VII. APPROVAL TIMELINES

When planning media campaign timelines and due dates, please allow for the following estimated time frames:

- A DAR requires approximately two weeks for processing.
- A SAR requires approximately six weeks for processing.
- A CAR/GOAR requires eight to 10 weeks for processing.

If changes are required, one week is needed by the department to make revisions; two weeks are then needed to resubmit for final approval. When necessary, some items may be expedited, though approval is not guaranteed if the document is submitted in a shorter period than indicated above.

WHEN TO USE DARs, SARs, GOARs and more

When to Use a Director's Action Requested (DAR)

- Scheduling proposal* for the Director to attend a media event;
- CDPH media campaign TV, radio, outdoor ad concepts;
- CDPH social media postings such as Facebook, Twitter;
- CDPH videos for YouTube, websites; or
- CDPH non-sensitive collateral items such as posters, brochures, fliers, videos, handouts.

DARS should be submitted four weeks in advance.

When to use a Secretary's Action Requested (SAR)

- Scheduling proposal* for the CHHS Secretary to attend an event or conference;
- Secretary commendation;
Advertising campaign scripts, storyboards, and final produced ads or PSAs;
outdoor and print ad mock-ups, and sensitive collateral items,
such as posters or brochures

SARs should be submitted six weeks in advance of date needed.

When to Use a Governor's Office Communications Action Requested (CAR)

Governor's proclamation, letter of commendation, letter/messages, retirement letter, video messages

CAR should include:

- Clearly described request
- Date approval needed
- Suggested text for proclamation, commendation, letter

CARs should be submitted 6-8 weeks in advance of date needed.

WHEN TO USE A GOVERNOR'S OFFICE ACTION REQUESTED (GOAR)

- Scheduling proposals* for the Governor and/or First Lady with an event overview attachment
- High profile or controversial reports or studies
- Legislative reports
- Correspondence for Governor's signature
- Any issue with budget or policy implications

***Scheduling Proposals**

Requests for Director, Secretary, Governor and/or First Lady participation should include:

- Clearly described request;
- Date approval needed; and
- Suggested overview of event as attachment.

GOARS should be submitted eight weeks in advance of date needed. If both the Governor and First Lady are invited to the event separate GOARS are required.