SOCIAL MARKETING FOR SOCIAL INCLUSION

A PRACTICAL GUIDE FOR APPLYING SOCIAL MARKETING IN THE DISABILITY SECTOR

HANDBOOK

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ENDORSEMENTS

Social Inclusion and Social Marketing handbook endorsements

"*This comprehensive handbook of social marketing for social inclusion makes an important and timely contribution to the field of social marketing and approaches for social change more widely. It builds upon a well-informed and clear presentation of social marketing principles and frameworks and a robust methodology. The multi-level social marketing cases studies and logical pedagogical method presented in this guide provide valuable learning and practical lessons for practitioners and policy makers wishing to promote social inclusion through social marketing interventions.*

The European Social Marketing Association (ESMA) endorses and recommends this guide to anyone interested in promoting and implementing social inclusion through social marketing."

Dr. Nadina Luca, PhD, Lecturer/Assistant Professor of Marketing, The York Management School, University of York, UK

Chair of the Board of the European Social Marketing Association (ESMA) (europeansocialmarketing.org/)

Member of the International Social Marketing Association (ISMA)

"This new practical guide to promoting social inclusion developed by the SIM (Social Inclusion and Social Marketing) project is a valuable addition to the growing guidance and evidence base about the utility of Social Marketing in addressing the complex challenges associated with promoting social inclusion. The practical case study focused approach set out in the guide is very helpful to those new to Social Marketing as is the clear and concise description of Social Marketing principles.

The International Social Marketing Association (iSMA) endorses and recommends this guide to anyone wishing to ensure that their programmes of action focused on social inclusion are informed by people focused Social Marketing principles and planning methodology."

Professor Jeff French, PhD, MBA, MSc, DipHE, BA, Cert.Ed.

President of the International Social Marketing Association (iSMA) (isocialmarketing.org)

Founding member and board member of the European Social Marketing Association (ESMA)

"

"Social marketing has a long and robust history in health education and public health promotion, yet limited work has been done in the disabilities sector. The social marketing framework encompasses the appropriate features to aligned with the core principles of the social model of disability, which espouses that the barriers for people with disabilities lie within society and not within the individual.

The first practical guide to promoting social inclusion through the SIM (Social Inclusion and Social Marketing) handbook will provide the tools needed for those aiming to address and improve social inclusion of people with disabilities by offering a framework for designing and implementing programs and policies that are more equitable and inclusive.

Through a presentation of the social marketing framework and detailed case studies in two European countries, this handbook is a much needed and useful resource for all those working in the disability sector, education, policy making, or studying social marketing.

As a PhD student working on decreasing health disparities for people with disabilities through the social marketing lens, I welcome this handbook and the opportunity it offers for future research and practice in the disability sector."

Angela Makris, PhD student, College of Public Health, University of South Florida (USF)

Member of the European Social Marketing Association (ESMA),
International Social Marketing Association (iSMA), the Social Marketing
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A

SECTION

INTRODUCTION TO SOCIAL MARKETING FOR SOCIAL INCLUSION

CHAPTER 1. INTRODUCTION TO THE HANDBOOK

1.1 Introduction

This handbook is one of the outputs of the SIM project, funded by the European Erasmus+ Programme (grant ID 2019-1-PT01-KA204-060716), which tackles the need to improve the social inclusion of disadvantaged groups, specifically those with disabilities. The handbook can be used as guided course curriculum or as a self-study book.

THE HANDBOOK IS DESIGNED FOR:

• Social educators in charge of improving the competences of disadvantaged groups (midstream level) and their supervisors (strategic level). In other words, people working in social inclusion about social inclusion programmes as well as front line professionals.
• University Professors who integrate it into their curricula of marketing, health, and social marketing studies.

THE HANDBOOK IS AIMED TO BENEFIT:

• Midstream level professionals: social educators such as social workers, psychologists, occupational therapists and employment mediators which directly work improving the competences of people with disabilities. The relationships developed in the disability sector between front-line professionals and customers are unique, genuine and long-lasting; and
• Upstream level professionals: decision takers, managers of organizations, training program developers who supervise the tasks of educators, providing the training needed organizational resources.

THE HANDBOOK WILL IMPROVE THE COMPETENCES OF SOCIAL EDUCATORS AND COORDINATORS TO:

a)   social marketing techniques and strategies;
b)   the English language;
c)   dealing with social inclusion problems from a different perspective;
d)   critical thinking;
e)   searching for and making use of relevant, trustworthy information.

1.2. Learning objectives

The handbook will contribute to social sector to integrate a methodology very useful to tackle problems from a practical perspective. Following explanations and tools, case studies are provided that illustrate social marketing for social inclusion and how to do it.

SPECIFICALLY, THE READER AND LEARNER OF THIS HANDBOOK WILL:

• Know when a social problem can be addressed by social marketing;
• Know what social marketing is and its associated models and frameworks;
• Understand how to apply social marketing to social inclusion programmes, activities, and policies in order to improve the quality of life of disadvantaged groups;
• Understand how to integrate social marketing within the social field.

1.3. Learning methodology: the case study and the pedagogical framework

The case study methodology is based on the resolution of business management and marketing problems. In this handbook this case study methodology will be adapted in order to analyse problems related to social inclusion from the marketing perspective. The use of case study as a methodology was developed by members of the Harvard Graduate School of Business Administration in the 1920s, and it has been widely accepted as one effective way of exposing students to the decision-making process.

Case studies represent detailed descriptions or reports of situations and/or problems to resolve. They are usually prepared by an observer who was involved in the situation and had some dealings with the problems under consideration (Yin, 2014; MacNealy, 1997).

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).

A CASE STUDIES THEORETICAL FRAMEWORK

An approach to case study involves a basic four-step process (Rasche and Seisreiner, 2018).

STEPS	DESCRIPTION
PROBLEM DEFINITION	This is the central concern of every case study. In the analysis of the problem, the professional should analyze the data carefully to extract the relevant details and delete the superfluous to get a clearer picture of the situation. so, the first phase is to consider the environment in which the problem is operating, and the analysis of the industry in which the organization does their work.
ALTERNATIVES WAYS OF ACTION ARE FORMULATED	Recognizing problems and their basic elements is critical for a meaningful case study. After a careful analysis, problems and their principal questions should be stated and listed in importance order (positive and negative aspects).
LOOKING FOR SOLUTION	In this phase you must start looking for a solution to the problem outlined above. It is usual that there are several alternatives that allow solving the same situation or problem. Therefore, after making a list of possible valid alternatives, the next step will be to analyze them 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 aspect that the different ones involved in the problem to solve will receive at the end of the process (personal satisfaction, good image, economic benefits, etc)
PROPOSAL OFFERED	Based on the results of the previous analysis, the solution proposal that best resolves the situation initially raised and that minimizes the appearance of new problems or conflict situations is chosen. It is important to explain why this solution was chosen and, also why the other solution alternatives were not selected. To complete this last phase, future actions must be guided and put into operation at the right time.

A CASE STUDIES PRACTICAL EXAMPLE

According to the four steps process that we have indicated before, we are going to propose a practical example:

STEPS	DESCRIPTION
PROBLEM DEFINITION	It has been detected in a center for the disabled that a large number of children suffer from anxiety due to COVID-19. The cause is found in the constant changes in their routines and the perception of fear in the current environment. Although the problem is not yet urgent, managers want to take steps to prevent future problems.
ALTERNATIVES WAYS OF ACTION ARE FORMULATED	Expert doctors in anxiety, local teachers and parents of affected children, meeting to analyze the subject, have proposed possible actions on how to act in this situation: **1.** Doing nothing and wait for everything to return to normal **2.** Designing lectures to give in classrooms about what the situation is like and how to adapt to it. **3.** Giving lectures parents on how to deal with their children **4.** Designing a practical manual on how to act and apply at home
LOOKING FOR SOLUTION	We analyze the different costs and benefits of each proposed alternative: **Option 1.** It is not a valid option. it does not facilitate the prevention objective **Option 2.** It does not seem valid due to the difficulty of children to understand and apply the contents **Option 3.** It could be a good alternative, but it is difficult to bring them all together due to their different schedules and covid restrictions **Option 4**. The manual should contain practical examples easy to understand and apply. In addition, a telephone, email or similar should be included, which facilitates contact for the resolution of doubts
PROPOSAL OFFERED	Disigning the manual is considered the best alternative. Managers could publish a physical document, delivering it in an initial meeting, by small groups or individually, and allowing to explain its operation and usefulness. It may also be appropriate to include a virtual format on the association's website, along with "frequently asked questions" on the subject.

1.4. Logical pedagogical framework

Although the concepts of the European qualification framework (EQF) and the European credit system for vocational education and training (ECVET) are very known by everyone, at this moment, it is useful to do some clarifications for those who do not belong to academic field.

The EQF follow a learning outcomes approach. This means that both the content and the level of a qualification reflects what learners are expected to know, understand and be able to do (learning outcomes). By focusing on what a learner knows, can do and can understand, learning outcomes help to open up final qualifications to a wider variety of assessment pathways and experiences.

In the European framework, there are several common instruments helping individuals in transfer, recognition and accumulation of their assessed learning outcomes, to achieve a qualification or to take part in lifelong learning. Beside EQF, we can find the European credit system for vocational education and training (ECVET). It uses flexible and individualized learning pathways, including transnational mobility.

Traditionally, qualifications have provided information about the final results of learners' assessment. However, information on what to expect from the learners in terms of knowledge, skills and competences, has been less known (European Parliament and Council of the European Union, 2008):

• **Competence:** Ability to apply learning outcomes adequately in a defined context (education, work, personal or professional development). Competence is not limited to cognitive elements (involving the use of theory, concepts of tacit knowledge); it also encompasses functional aspects (including technical skills) as well as interpersonal attributes (e.g. social or organizational skills) and ethical values.
• **Skill:** Ability to apply knowledge and use know-how to complete tasks and solve problems.
• **Leaning outcomes:** Set of knowledge, skills and/or competences an individual has acquired and/or is able to demonstrate after completion of a learning process, either formal, or non-formal.

Learning outcomes to acquire

1. Manage sources of information related to social marketing.
2. Search, collect, manage and draw conclusions from such information.
3. Recognize different users' profiles.
4. Develop an interpersonal relationship.
5. Manage criteria, instruments and have skills in the process of disseminating information.
6. Relate the different elements that interact in the decisions of users.
7. Ability to make decisions in certainty and uncertainty environments.
8. Ability to plan, organize, control and evaluate the implementation of social strategies.
9. Be able to identify the needs of different types of users.
10. Know the main variables that affect the behaviour of different types of users.
11. Motivation for quality of service.
12. Promote the development of attitudes and values that establish favourable conditions for ethical behaviour in the development of professional activity.

THE LOGICAL PEDAGOGICAL FRAMEWORK

Accordingly to the project, the logical pedagogical framework should follow this way:

1- Identify professionals needs;
2- Propose learning objectives;
3- Propose learning outcomes: knowledge, skills and competences;
4- Training content;
5- Pedagogical methodoloy;
6- Evaluation.

Accordingly to factorial analyses, we propose to following:

1- (Midstream level) Front-line professionals: Psychologists, therapists, caregivers…

Factor 1: Understanding clients´behaviours:

1.1. Identification of phychological risks factors associated with poor health life styles.
1.2. Developing a program (needs, objectives, indicators...) to foster healthy life styles.
1.3. Evaluation and segmentation of users environmental needs.
1.4. Identification and pairing of users needs and their supporting technological devices.

Factor 3. Client´s value co-creation

3.1. Developing an intervention program together with mainstream services (community services).
3.2. Assessing the implementation of educative programs in the daily life activities of our users.
3.3. Program to effectively communicate users progresses to the families.
3.4. Program to joint developed leisure time activities with families and mainstream services.

2 - (Strategic level): Coordinators, evaluators, program desginers and managers.

Factor 2: Stakeholders mapping

2.1. Program to improve the image and reputation of my organization among the stakeholders.
2.2. Understanding the needs of my stakeholers and their influence in my organization.

Factor 4: Stakeholders value co-creation.

4.1. The power of stakeholders to support my intervention programs.
4.2. The desing of organizational objectives and indicators according to the needs, power and influence of my stakeholders.
4.3. Being helped by stakeholders to assess the social impact of my intervention programs.

TABLE 1: EXAMPLE OF LOGICAL PEDAGOGICAL FRAMEWORK IN UNDERSTANDING USER BEHAVIOR

Logical pedagogical framework – Understanding users' behavior						
Needs	**Objectives**	**Learning Outcomes**	**Training hour**	**Pedagogical materials**	**Training methodology**	**Evaluation tools**
Understanding users' behavior for front line professionals	1 – Be able to identify the needs of different types of users.	Definition of need	0,5	PPT presentation	Theoretical learning	Pre-evaluation questionnaire (paper)
		Manage sources of information	1	Work sheet	Practical learning	
	2 – Be able to identify the behavior of different types of users.	Develop interpersonal communication	0,5	PPT presentation work sheet	Theoretical learning Practical learning	Post evaluation questionnaire immediately after implementation of 1st unit (on-line)
		Understand decisions of users	0,5	PTT presentation	Theoretical learning Practical learning	
	3 – Be able to relate the needs and the users' behavior	Theoretical framework on social marketing	0,5	PTT presentation	Theoretical learning Practical learning	Follow up evaluation questionnaire (6 months after implementation of the training) (on-line)
		Promote development attitudes and values	1	PPT presentation, posters, worksheet	Practical learning	
		Motivation for quality of service	1	PPT presentation, posters	Practical learning	

CHAPTER 2. THE IMPORTANCE OF SOCIAL MARKETING FOR SOCIAL INCLUSION

Social exclusion of people with disabilities is a social problem that can be addressed by using social marketing. By definition, social problems are:

> "condition[s] or pattern[s] of behaviour that (1) contradicts some other conditions or pattern of behaviour 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).

Social marketing is a discipline that addresses such complex social problems. It starts by understanding root causes and the changeable 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 was initially used in family planning programs (Chandy et al 1965), but has expanded to the most wicked social problems globally. This includes sustainable development goals, social inclusion, water and sanitation, vaccina-tion, biodiversity, environmental sustainability, and behaviors related to NCD (non-communicable disease) and NTD (neglected tropical diseases) prevention (Aya Pastrana, Miranda, et al., 2017; Aya Pastrana, Somerville, et al., 2017; Firestone et al., 2017; Gordon et al., 2006; Kubacki et al., 2015, 2017; Kubacki & Szablewska, 2017, Bardus et al., 2019). It is suggested 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 multidisciplinarity in solving social problems, social marketing can be adapted to the disability field, addressing the social inclusion of disadvantaged groups.

2.1. What is social marketing?

The basic characteristic of social marketing is that it focuses on changing behaviors that perpetuate or cause social problems; this includes individual, environmental, and structural changes, as well as policy changes.

> "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 sen-sitive and segmented social change programmes that are effective, efficient, equitable and sustainable." (Tapp et al., 2013).

The key features of social marketing include: Insight, Exchange, Competition, Audience Segmentation, Behaviour and Method Mix (ECDC 2014), as showned in figure 1 below (French and Blair-Stevens, 2006):

According to French and Blair-Stevens (2006), the social marketing customer triangle "is a visual way to highlight the key features of social marketing". Six key concepts are emphasised: Insight, Exchange, Competition, Audience Segmentation, Behaviour and Method Mix. The customer is in the centre of the process. These concepts are the essential factors for a successful social program that aim to influence behavior.

2.2. Social Marketing Benchmark Criteria

Social marketing for social inclusion of PwD (People with disabilities), might improve policies and/or services that improve the experience of PwD. This is done by undertaking evidence about what works and what does not work through the establishment of demonstration projects. Social marketing techniques help you collect the necessary data through the "expert" 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, social marketing helps to ensure policy building solutions around citizens real needs, making policy goals realistic and achievable (National Social Marketing Centre).

To do that and adhere to social marketing aims and principles, the following social marketing benchmark criteria serve as a guiding framework. Programmes that adhere to all 8 criteria are more likely to achieve more success. The benchmarks are essentially the key elements that should be in place if an intervention is to accurately describe itself as social marketing and to enhance impact and effectiveness of them (French&Blair-Stevens, 2006 SMBenchmarks).

1. CUSTOMER ORIENTATION	Understanding of the audience, based on research, combining data from different sources and perspectives.

• **How is it done?** Do research on your target audience, study the literature and/or explore with them their perspective on the social problem, combining data from different sources (qualitative and quantitative data). In this phase you should ask yourself: "Do I really understand my target audience and see things from their perspective?".

• **What is the outcome?** You will develop a robust understanding of the target audience, which focuses on understanding their behaviours, attitudes, beliefs and what influences them (this point is crucial for next benchmark such as competition, exchange and insight).

2. BEHAVIOR	This imply a specific focus on behavior, based on analysis and synthesis.

• **How is it done?** Gather and analyze information about the current behavioral patterns that you plan to change. This means defining what are the specific behaviors related to social problems you are trying to solve; you may address knowledge, attitudes and beliefs, but only as a means of influencing behavior.

• **What is the outcome?** You will establish specific actionable and measurable behavioral outcomes and indicators. You can address four different behavioral issues: start of a behaviors; modification of behaviors, maintenance / reinforcement of behavior.

3. THEORY	Behavioral theory is used to assist the development implementation and evaluation of programmes.

• **How is it done?** Research and select an appropriate theory that helps you inform, test and/or guide the design and evaluation of the intervention; in fact, you should use theories and models as starting points for understanding and not as end points. When considering theories, take into account behavioural theory from a wide range of fields of study and research.

• **What is the outcome?** The choice of an appropriate theory or set of theories will guide your understanding of current behavior and its change.

4. INSIGHT	**The deep truth about what influences target audiences behavior.**

• **How is it done?** Analyze research results (see point 1) and develop 'actionable insights' addressing the question: "what needs to change in order to make people change their behavior?".

• **What is the outcome?** The insights will drive the action which leads to the behavioral results.

5. EXCHANGE	**Incorporates an 'exchange' analysis that provides understanding about costs and benefits associated with target behaviors and the development of possible interventions**

• **How is it done?** Understand costs and benefits associated with target behaviors. In this phase you should ask yourself: "Do the benefits of doing what I would like my target audience to do outweigh the costs or barriers to doing it?" (you will understand costs and benefit through research, point 1).

• **What is the outcome?** You will develop propositions that aim to create social value for the citizen and or society at large in the form of interventions that deliver rewards or in some cases penalties related to the target behavior.

6. COMPETITION	**Has two elements: Competition analysis to understand what competes for the time and attention of the audience and 'Competition planning' to reduce the impact of these factors.**

• **How is it done?** Understand and assess what is the internal and external competition (eg internal competition: psychological factors, pleasure, desire, risk taking, genetics, and addiction; eg external competition: economic, social, cultural and environmental influences). You can explore it through research (see point 1).

• **What is the outcome?** You will develop strategies according to the findings to reduce the impact of competition on the target behavior and promote the desired behavior.

7. SEGMENTATION	Identifies groups who share similar views and behaviors and can be influenced in similar ways.

• **How is it done?** Segment the audience using demographic, observational, psychological and behavioral data to identify groups that are similar and can be influenced in common ways.

• **What is the outcome?** Segmentation will lead you to the development of interventions directly tailored to specific audience needs and values, increasing the efficacy.

8. METHODS MIX	Brings together the most effective mix of interventions to influence the target behavior.

• **How is it done?** Select which mix of types of interventions will be most effective and efficient in influencing target behaviors after having analyzed the citizen insight data, segmentation, competition, and feasibility. There are five primary strategic intervention 'Types', that can be combined for any Social Marketing plan, that are: 1) Inform (communicate, prompt, trigger, awareness, remind…), 2) Control (constrain, restrict, police, regulate, legislate…), 3) Design (physical product, process, environment…), 4) Educate (enable, train, engage, skill development, motivate…), and 5) Support (assist, promote access, social networking, social mobilization…). In this phase you should ask yourself: "Am I using a combination of activities in order to encourage people to achieve the desired action?".

• **What is the outocome?** You will select intervention approaches to take full account of the different behavioral mecchanisms and components. Formative research and the understanding of your target audience will allow you to select the right mix of interventions to achieve synergy and enhance overall impact.

Edited from: French, J. (2014). Social Marketing 8 Point Criteria (updated). Strategic Social Marketing.org Available at: http://c-cluster-110.uploads.documents.cimpress.io/v1/uploads/512c245b-0478-4119-96dd-42614cc882bb~110/original?tenant=vbu-digital (exact duplicate except for layout changes)

2.3. Case studies: examples

Introduction

As stated previously, social marketing concepts are the necessary ingredients for successful social programmes that seek to influence behavior and gain popular public support (French & Apfel, 2014). The case studies selected utilize the social marketing principles combined with a community-based development approach. The community-based interventions have a focus on a collaborative approach to research, fostering joint learning, skill-sharing and capacity- building among all partners (Israel, et al., 2005).

Many social marketing initiatives are 'community interventions', in the sense of being based within communities and involving community members as research participants (Stead et al., 2013). The initiatives of the community-led approaches are indeed grounded in the needs, issues, concerns, and strategies of communities and the community-based organizations that serve them (Cornwall and Jewkes, 1995), therefore, deriving from issues identified by the community rather than by experts, aiming at encouraging empowerment, fostering participation, and increasing equity reaching the 'hard to reach' (Baum, 1998).

Traditionally, in the disability field, research has been performed "on" those with developmental disabilities, with a focus on the disability, rather than "with" people as humans, with a focus on their desires, which often relate more broadly to wellness, access to health care, and quality of life (Rimmer et al., 1999). Social marketing community-based interventions for promoting health and social inclusion are ideal for those with developmental disabilities because they address developmental appropriateness, research mistrust, social inclusion, self-efficacy, and sustainability (Arble et al., 2006).

Below are just two examples we can refer to:

CASE STUDY 1

The Healthy Lifestyle Change Program
A Pilot of a Community-Based Health Promotion Intervention for Adults with Developmental Disabilities

Alicia T. Bazzano, Ari S. Zeldin, Ida R. Shihady Diab, Nicole M. Garro, Nathalia A. Allevato, Danise Lehrer, and the WRC Project Oversight Team, (2009). American Journal of Preventive Medicine, 37(6S1):S201–S208)

Contextualization	Obesity and inactivity **are more common in people with developmental disabilities than in the general population** (Rimmer et al., 1993). This health disparity may be due to individual and community factors including physical challenges, cognitive limitations, lack of accessible adaptive fitness facilities, segregation from the community and others. **People with developmental disabilities experience high rates of secondary conditions associated with obesity and inactivity, such as type 2 diabetes, cardiovascular disease, and metabolic syndrome** (Beange et al., 1995).

	Promoting and sustaining weight loss is a challenge, but health promotion programs including diet, exercise, and behavior modification can promote weight loss and reduce or prevent the chronic complications of obesity (National Heart, Lung and Blood Institute, 1998). During 2004–2005, staff in the Health and Medical Department at Westside Regional Center (WRC), a community organization serving people with developmental disabilities, noted an increase in obesity and type 2 diabetes diagnoses among adult clients (Bazzano, 2009).The Healthy Lifestyle Change Program (HLCP) was developed, implemented, and evaluated at WRC. The WRC is a community organization that serves approximately 6000 clients, which include children and adults with developmental disabilities; defined as mental retardation, autism, epilepsy, cerebral palsy, or similar conditions (e.g., borderline intellectual functioning), (Bazzano, 2009). The aim of their intervention was to provide services such as care coordination, health education, and provision of resources to all people with developmental disabilities living in western Los Angeles County, California USA.
Results	The final evaluations of the HLCP were: (1) weight loss; (2) improved dietary habits; (3) increased exercise; (4) increased self-efficacy; (5) improved access to health care; (6) improved life-satisfaction; and (7) increased community capacity. The Healthy Lifestyle Change Program resulted in improved lifestyles, weight loss success, and increased community capacity. In particular, two thirds of participants maintained or lost weight, sixty-one percent of participants reported increased physical activity (both frequency and duration). Significant improvements in nutritional habits and self-efficacy were reported. Over half (59%) of participants showed improvements in life satisfaction. Participants received 206 referrals for needed medical care.These results indicated that a Social Marketing program that utilizes a community-based approach with significant participation of those with developmental disabilities is feasible.
Benchmarks (8 Social Marketing reference criteria)	
Customer orientation	The director of the intervention brought together a team composed of individuals with developmental disabilities, parents of individuals with developmental disabilities, WRC staff, academic researchers, and community-based professionals with extensive experience working with developmental disabilities, including a behavioral psychologist, a dietician, fitness instructors, nurses, physicians, a physical therapist, an occupational therapist, a pharmacist, and public health professionals. This team met weekly to decide on all aspects of the program, including planning, curriculum development, implementation, evaluation, and dissemination. Academic researchers acted as consultants providing information and facilitating discussion. **These meetings were extremely useful in order to have a broader understanding of the problem and its solutions, under all the possible different points of view.**Two focus groups were conducted initially with clients to clarify what type of program would be of interest; what the potential challenges might be; and how to address challenges (e.g., format, locations, community inclusion).

Behavior	Due to the weekly meeting and the focus groups, an understanding of the existing behavior and key influences on it was gained. The project team was able to devise an intervention to effect a change in (1) dietary habits and (2) exercise; while improving (3) self-efficacy; (4) community capacity; (5) access to health care; (6) life-satisfaction and (7) healthy weight.In specific, changes in weight, BMI, abdominal girth, access to care, and self-reported nutrition, physical activity, and life satisfaction were each measured.
Theory	The HLCP conceptual model was based on **Bandura's Social Cognitive Theory** of health behavior (Bandura, 1986). It was hypothesized that, in addition to demographic characteristics, social environment and individual cognitive factors would significantly impact outcomes. The model focuses on increasing participant's belief in their own ability to successfully perform a behavior (self-efficacy), through learning, positive reinforcement, and peer mentoring. The peer mentors were eleven adults with developmental disabilities that received training so that they could serve role models for healthy behavior.
Insight	The collaboration between the members of the developmental disability community and the health professionals and academic researchers, helped in shaping the intervention design and reviewing potential curricular materials, gathering all the insights needed to understand what influence the audience behavior. For example, based on insights from team members with developmental disabilities, the program's exercise component was not integrated into existing community health clubs because of concerns that participants would feel awkward or out-of-shape if surrounded by typical Los Angeles health club members. Based on the insights gathered from the focus groups, core aspects of the final program included: (1) client peer mentoring; (2) interactive health education; (3) supervised physical activity; (4) behavioral modification; (5) one-on-one health management education and advocacy; (6) clinical support; and (7) a supportive social network.
Exchange	**Analysis of costs and benefit** The behavioral analysis gave an understanding of the real costs of conducting a healthy life for the disabled people and the project team was able to create a social value for citizens addressing some of those issues, for example: logistical issues (where to hold the classes due to physical constrictions of the participants). The program was designed to be conducted at WRC rather than at other locations in the community because it was familiar, accessible, and centrally located, with a bus stop nearby. **Benefit** Rewards with incentives for achievements such as attendance, weight loss, and program completion were delivered.
Competition	The project team recognized that there would be competition in terms of lifestyle. **External and internal influ nces** were competing for the audience's time. The competition benchmark is only partially met in this study. The authors did not give specific information about what were the main competitors of the desired behaviors, explaining for example if the audience was not doing enough exercise because they were busy, or lazy, or what was replacing in general the good physical activity in their life.

	The same reasoning is valuable even for the other health behavior. This phase is very important in order to develop strategies according to the findings to reduce the impact of competition and promote the desired behavior.
Segmentation	Behaviors at baseline and specific needs of each group required different behavior changes and tools to achieve them. Adult clients of WRC, aged 18 – 65 years, were segmented in three groups: higher-functioning (i.e., living with family, independently, or with supported services in the community), overweight/obese (BMI >/= 25) and those who had an additional risk factor (such as hypertension, hyperglycemia…) for developing diabetes or metabolic syndrome, or already had diabetes.
Methods	A range of methods were used to address issues the audience had voiced using 3 types of intervention: design, educate, and support. **Design** 　o The program was designed to be conducted at WRC rather than at other locations in the community because it was familiar, accessible, and centrally located, with a bus stop nearby (process facilitation); 　o Exercise was integrated into the community through the use of local parks and a fitness facility (change in the environment that facilitate the adoption of the behavior). **Educate** 　o Exercise video created by the peer mentors (besides design, this can also be intended as education, because it teaches the exercises); 　o Peer mentors received training on health and fitness, leadership, and motivational strategies so that they could serve as leaders, teachers, and role models for healthy behavior; 　o Twice-weekly 2-hour sessions conducted over 7 months at WRC and other community locations. Each class included 50 minutes of interactive health education, a 10-minute healthy snack break, and 1 hour of supervised physical activity. The education sessions emphasized six topics: general health/self-care, nutrition, physical fitness, chronic conditions, medications, and behavior modification. **Support** 　o Peer mentors: peers were better equipped than professionals to support others who face similar challenges, life experiences, and barriers to health: their role was to made reminder phone calls to participants, led physical activity sessions, make healthy snacks, and helped in the evaluation assessments. Peer mentors also presented program results at community meetings and academic conferences alongside researchers;

o All participants had access to support from project staff and peer mentors; participants' families and support staff were encouraged to attend; participants received also support to increase confidence in their ability to access health care;
o Creation of social network through the classes (nineteen of the original clients and 37 newer clients continue to participate, forming social networks).

NB. Some activities promoted can comprehend more categories. The important thing is that you have the opportunity to use different approaches.

CASE STUDY 2

Healthy Heroes, Magic Meals, and a Visiting Alien: Community-Led Assets-Based Social Marketing.
Martine Stead, Lisa Arnott, and Emma Dempsey (2013). Social Marketing Quarterly. 19(1): 26-39.

Contextualization	The Community Healthy Lifestyles pilot program was set up to explore the feasibility and value of using social marketing within a community development context and sought to engage local communities in activities contributing to the prevention of obesity among children and families (Stead, 2013). Funded by the Fairer Scotland Fund, the program took place in Muirhouse in the north of Edinburgh and Moredun in the south of Edinburgh. Both communities have higher than national average levels of income deprivation and unemployment, cancer and coronary heart disease mortality, and lower than average life expectancy (NHS ScotPHO, 2010). The aim of this intervention was to evaluate the feasibility of developing and implementing the project engaging the community residents, emphasizing intermediate outcomes such as engagement, empowerment, and changes in capacity. This project illustrates how communities have skills and assets within themselves which they can bring to bear in a social marketing framework (Stead, 2013).
Results	In less than 18 months, project workers were appointed, projects established, and an impressive number of activities implemented. This volume of activity can be attributed not just to the energy and skills of the individual project workers, residents, and other volunteers, but, fundamentally, to the approach itself, which, by harnessing community assets, meant that potentially more could be achieved than through external professional or bought-in expertise.

Benchmarks (8 Social Marketing reference criteria)	
Customer orientation	*Needs Assessment:* Low cost and creative methods were used to gather input from 535 residents. These include visits to community groups, suggestion boxes, post-it note graffiti walls, and questionnaires at the library, food stores, community centers, and hairdressers. Moreover, the project team consulted school staff, local police, travel coordinators, shopkeepers, local businesses, and local community center staff. After that, the findings were compiled and discussed with small groups of local residents, who then decided on priorities and activities. *Asset Mapping:* The asset mapping was useful to identify assets within the community. It investigated: social assets (statutory organizations, voluntary groups, businesses, retailers, and informal groups and networks); cultural assets (e.g., the Edinburgh College of Art, library, arts center) and creative individuals, such as writers, photographers, illustrators; material assets (community facilities, potential funding sources, and the physical environment); and finally, individual assets (skills, time of local residents, volunteers, and partner organization employees). In North Edinburgh, a literal map was produced as an accessible way of encouraging people to identify potential partners and strengths in the community.
Behavior	Due to the deep focus on the population's needs and mapping assessment, the authors gained an understanding of the existing behaviors and the key assets within the community, in order to positively influence it. The desired behavior change was defined as engagement with healthy lifestyle activities: healthy eating and physical activity.
Theory	The project team specified that they wanted to encourage residents to think strategically without overburdening them with complex theory, therefore, even if their intervention is theory based, it is not specified what behavioral theory was used to assist the development of the program. Theory should always use transparently to inform and guide development, and theoretical assumptions tested as part of the process (French, 2006).

| **Insight** | Both challenges and strengths in the communities were identified. Some aspects of the community were considered negative, (e.g. the poor reputation of the communities in the media) whereas some others brought proud (e.g. respected history of local campaigning and activism in the Northern regions). Important assets of both communities were identified (e.g. attractive open spaces).
From the insights gained from the asset mapping and needs assessment, four themes and principles emerged to guide the selection of project activities:

o Validation and celebration. Projects would not focus on what the communities were doing 'wrong' but on what they were already doing 'right'. This meant helping people to recognize and feel proud of both their own achievements and skills, and the assets of the communities around them; eg many residents walk a lot during the day, yet they tended not to regard this as "proper" exercise because it was done out of simple necessity rather than to keep fit. Existing healthy behaviors in the communities should be validated rather than focusing on behaviors which people were not yet achieving;

o Speaking to and sharing with one another. The needs assessment and asset mapping highlighted the power of local voices and role models. Residents spoke of the value of a peer who could motivate them to exercise, suggest solutions and encourage healthy cooking. The guiding principle was that information, advice, and encouragement should come not from experts but from residents themselves;

o Fun. Project activities should generate a buzz which people wanted to be part of and which made them feel positive about the communities and themselves. Any health messages should be light touch and secondary to key benefits such as enjoyment, achievement, and participation;
o Creativity. Both projects identified the potential of creativity as a strategy for engaging people's interest, generating project activities and materials, and building feelings of pride and achievement. |
| **Exchange** | **Benefits**
The social value created for the citizen was to create an intervention that was enjoyable for the community and to deliver a sociable experience for all. The aim was to generate fun and positive feelings of fellowship among the community. This focus on fun was compatible with Smith's (1999) social marketing mantra of making behavior change 'fun, easy and popular'.
Costs
The authors in this study did not mention what were the perceived costs of desired behaviors or participation in the program itself and how those costs were addressed or lowered. For this reason, the benchmark is only partially met. |

Competition	The competition was defined as the perceptual and practical barriers identified in the needs' assessment. The project team was able to identify and address the barriers that impacted negatively on people's ability and motivation to live healthier lifestyles. **Internal competition:** o Perception that healthy food was expensive and not easily accessible without traveling out of the communities; o Lack of time because of working and family duty encouraged a reliance on convenience foods; o Lack of skills, such as not knowing how to prepare a meal from scratch; o In terms of physical activity, several residents felt they were unfit but lacked the means and motivation to engage in "boring" exercise. The most frequent justifications were that exercise is "expensive," reflecting a perception that it meant going to a gym or class (Northern habitants). **External competition:** o Poverty; o Unemployment; o Housing; o Neglected state of some of the parks (Southern habitants).
Segmentation	Segmentation leads to the development of interventions directly tailored to specific audience needs and values. In this intervention, the target groups were defined as children or low-income parents for some specific project activities, while other activities were aimed more broadly at all community residents. Specific stretegies of segmentation were not mentioned.

Methods mix	**Inform** o Billboard and bus stop poster campaign featuring photographs of groups of local people being "healthy heroes," with the strapline "We are becoming healthy heroes. You can too". Men's football club, women's fitness group and chair-based exercises for elderly and frail people where represented. **Control** o 6-month partnership created with a local food store to promote healthy home cooking. Each month focused on a favorite recipe of a local resident. The aim was to promote the home cooking rather than fast food consumption. The slogan of the initiative was: "Tastier than a ready meal, healthier than a ready meal and cheaper than a ready meal". **Educate, Inform and Design** With creation of events, you can often combine more than one category in your activities. This is the reason why you'll find education, inform, and design together here: o Photography competition which aimed to encourage people to visit and appreciate the area's green spaces (inform about the green spaces); o Creation of a picture storybook for preschool children to encourage them to feel proud of living in their city and to normalize healthy activities such as outdoor play and eating fruit and vegetables (education as a form of encouragement); o Promotion of a 1-day event to encourage walking and appreciation of the green areas. At the end of the walk participants received a Certificate of Achievement and a "good bag" containing a "Passport to Health" (a set of discount vouchers for the local leisure center and other local amenities), plus fruit, water, and other items (educarional motivational component and reward design); o Cooking competition with the donation of a recipe book. The successful recipes of the residents were added in a colorful cookbook which was launched in Mothers' day (educational component and design of the recipe book). **Support** The social mobilization and the social networking created through this event can be considered as a support for behavior change.

2.4. Social inclusion

What is social inclusion?

Social inclusion, alongside with social exclusion, as well as social cohesion, are the terms frequently used in regards with the government initiatives and programs, state policies and associated funding measures:

`Social exclusion` generally describes the phenomena where particular people have no recognition, 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 civic rights among which is also the right to work and receive income.

What does social inclusion mean in the context of disability?

Within SIM project the outcomes are based on the Quality of life (QoL) model, which is the conceptualized framework widely used by social service providers and policy makers within the contemporary social environment. The approach of quality of life has increasingly being applied to people with disability over the past 20 years (Schalock, 2007). Disability organizations use this approach as a guide to their programmes and to measure the personal outcomes. "It has become the link between the general values reflected in social rights and the personal life of the individual" (Buntinx & Schalock, 2010). According to this approach, QoL is a multidimensional phenomenon based on one of the most important theoretical models also shared by social marketing: the ecological paradigm (Bronfenbrenner,1979). According to it, disability and human functioning are based and explained by the interactions between environmental and personal characteristics. "The ecological model understands disability as an individual limitation in a social context" (Brown et al., 2009). "It is based upon a system perspective in which several environments (macro, meso, micro...) are influencing the person´s wellbeing" (Verdugo et al., 2005).

How social inclusion has been broken down into specific criteria that can be addressed by social marketing?

The table below (table 2) offers a set of social inclusion criteria to be considered when selecting and developing the 6 SIM case studies. It is expected that these case studies will fulfill and reflect on those criteria.

Process

To develop the social inclusion criteria, two models of quality of life assessment (from the World Health Organization, WHOQOL, and the model developed by Robert Schalock) have been analyzed in detail. Both models emphasize essential domains and factors for assessing quality of life in populations that, for reasons related to disability or impairment, have difficulties in social participation and therefore in inclusion in their life contexts.

The points of contact between the models of quality of life provide tracks to identify dimensions and indicators of social inclusion, seen as something comprehensive that considers all dimensions of human life, at the micro, meso, and macro levels.

For the definition of dimensions and indicators of social inclusion and seeking to establish a credible and well-founded conceptual framework, other two models were taken into account: the Social Model of Disability (Barnes (2000), developed by the UPIAS movement (Union of the Physically Impaired Against Segregation), as well as the Human Development Model - Handicap Production Process (Fougeyrollas & Charrier, 2013), which is a conceptual model that aims to document and explain the causes and consequences of diseases, traumas and other damages to integrity or development of the individual.

Table 2 presents the twenty criteria created, organized into four broad categories, that aim to provide a comprehensive answer and fit all people's living environments. In order to assess whether there is social inclusion in people's contexts of life, we must consider:

Personal conditions • Environmental conditions • Social participation • Employment conditions
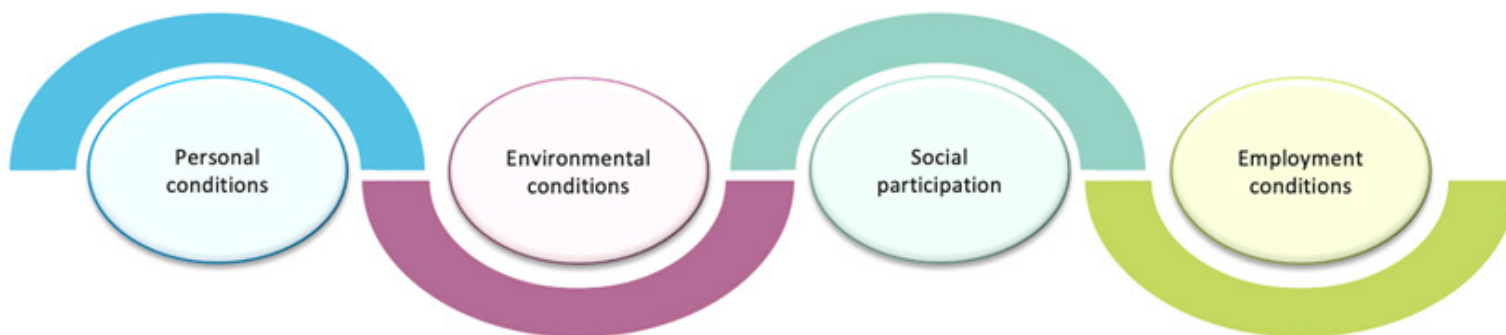
• The personal conditions of each individual, including here all the conditions of physical, mental, cognitive and behavioral health and well-being, as well as economic and cultural inclusion conditions and linguistics that allow everyone in particular to have tools to fully interact socially;
• The environmental conditions, for achieving an environment that is favourable to the participation of all. The indicators comprehend access to goods and services, accessibility conditions, housing, or social networks, in addition to public policies that allow individuals to exercise civil rights;
• Social participation, that seeks to bring together a set of criteria that are causally related to the role that each of us plays in a given social context, bringing together the most favourable conditions. Participation implies that affective, professional and neighbourhood relationships are developed, in the leisure, political ideals, social and religious contexts;
• Employment conditions, because it is a fundamental category in order to conclude whether there the social inclusion is fully achieved.

Table 2: SOCIAL INCLUSION CRITERIA

Domain	Criteria	Description	Score (1-5)
Personal conditions	Physical conditions and psychological health	It refers to the physical and psychological health conditions that allow the individual to play their affective and social roles, as well as the job requirements, respecting the accessibility conditions that should / could be created.	
	Economic conditions	It is related to the economic and financial conditions necessary for the individual for full social inclusion in all areas.	
	Cultural and linguistic conditions	It is related to the respect for the culture and mother tongue of each individual and to the creation of conditions for him to intervene and live in society fully.	
Environmental conditions	Access to goods and services and public funding schemes	It refers to access to goods and services available in the community, as well as opportunities to apply for financing to introduce social innovation, improve opportunities for vulnerable groups or enrich the environment.	
	Access to the functioning health and education systems	Related to the enjoyment of all the conditions available in public health and education services, as a means of promoting education and physical and psychological well-being.	
	Availability of social networks / partnerships	Related to the opportunities that the person has to participate in networks, community groups and make partnerships to achieve their personal and social goals, while this brings mutual satisfaction to all members of the community.	

	Housing conditions	Related to access to housing with the necessary actions, similar to those of their social peers, with the necessary accessibility conditions for each individual.	
	Accessibility conditions and access to technical aids / technology	Related to the enjoyment of private and public facilities without obstacles so as to allow participation in society without physical or social barriers, regardless of age, sex, ability or cultural background, it can also participate in social, economic, cultural and leisure activities. It also implies the individual's ability to use websites, electronic portals, blogs, social networks, e-learning platforms and other content on the internet, using accessibility features incorporated in the software, screen readers or others.	
	Legislative policy to promote inclusion	It is related to the existing legal conditions that regulate public relations in the field of inclusion, as well as providing measures and benefits for creating equal opportunities for all citizens in all fields of social participation.	
Social participation	Interpersonal and affective relationships	It refers to the possibility of maintaining social contacts with people with different educational and professional backgrounds, as well as in different social roles - acquaintances, friends, support workers, business partners, fellow mentors and others who belong to the individual's extended network. It also refers to affective relationships of all kinds.	
	Inclusive communication	IIt is characterized by an appropriate and respectful language, as well as the free exchange of messages, thoughts and feelings without barriers between the communication partners. They use various communication tools, such as: spoken language, non-verbal gestures, intonations, written notes, pictograms or other images that can complement or replace verbal speech.	

	Participation in leisure activities	Leisure generally refers to the activity - in addition to the obligations of work, family and society - to which the individual becomes comfortable, to relax, have fun or expand his knowledge, creativity and socialization.	
	Membership in clubs or interest groups and religious groups	Related to the individual's belonging to informal or non-formal community structures, promoting common interests, joint actions, charity and volunteering and religious practices.	
	Participation in civic activities / initiatives	It is related to opportunities to unite different movements, initiatives or projects in order to implement or protect civil rights, as well as to improve citizenship.	
Employment conditions	Respect for difference	Related to a work environment in which employees have different social, economic and ethnic backgrounds, as well as different health statuses - physical, emotional and mental. Differences between people are recognized and appreciated, and the focus is placed on personal strengths and values and professional qualities.	
	Access and adjustments in the workplace	Related to the absence of physical, environmental and attitude barriers, which prevent free access to information, interviews or accommodation, as well as any adaptations that can be made to improve the productivity of individual performance and the efficiency of the worker.	
	Long-term employment	Related to a work situation with a job for more than 12 months and have the chance to retain the work if they meet the requirements.	
	Socially responsive employment	Job-related, which generates benefits not only for the company, but for the entire community, in addition to con-tributing to the solution of socially significant problems.	

	Access to unemployment insurance	It mainly refers to the predictability of dynamics in the workplace, minimized risk of job loss and accurate social security payments.	
	Economic remuneration	Work-related, which allows the person to generate income for himself, in addition to bringing benefits to the company, where the person is employed.	

CHAPTER 3. SOCIAL MARKETING PLANNING AND EVALUATION

The following planning model can help you design and evaluate a social marketing programme, step by step, incorporating the 8 benchmark criteria that were presented in the previous chapter.

In this chapter, we provide a planning model specifically designed for practitioners who are the beginning of their social marketing practice, the AddELast Model which is adapted from two existing models: the STELa steps model (French et al., 2010) and the ADD model (Suggs et al., 2015). Throughout the planning model, the benchmark criteria are highlighted to help you understand how the benchmarks are taken into consideration in the different stages of the development of an intervention or programme.

The AddELast Model

The AddELast Model (Table 2) is composed of 4 main Planning Steps (Assess, Design, Do and Describe) and their relative sub-tasks (8 activities). Throughout each step, we provide tools (see Annex) that will help you to put social marketing concepts in practice and in different contexts.

The importance of "value co-creation"

Value co-creation should guide all social marketing intervention development, implementation and evaluation. In simple terms, co-creation is expressed in the form of "interaction, communication and collaboration with the target audience, in order to enhance the output value of favorable and desirable behaviors that the public are willing to adopt" (Hasting and Domegan, 2013). Therefore, participants in co-created projects are not passive consumers, but instead, active ingredients in the analysis, development of strategy and structured learning to achieve behavior change (Lefebvre, 2009, p. 142-144). This does not mean that you have to give up your responsibilities by just responding to what people say they need and want, but it is about understanding and engaging people as partners in defining problems and their solutions. Hastings and Domegan (2013) describe the process of value co-creation as: value co-discovery, value co-design, and value co-delivery.

Table 2: ADDELAST MODEL

Social Marketing Planning Steps	Tasks	Tool	Value co-creation	Outcome
1. Assess	a. Problem definition (behavior and target population selection)	Problem Statement and target group template (1)	Value co-discovery	A clear understanding of behavioral dimension of the problem and target group.
	b. Stakeholder Analysis	Stakeholders Matrix (2)		
	c. Situation Analysis	SWOT analysis matrix (3)		
	d. Target population research and analysis (desk and formative research): - Tools for audience research - The importance of theory	Field research check plan (4) Audience persona (5)		
	e. Baseline Evaluation	SMART objectives template (6) Logic framework (7)		
2. Design	f. Social Marketing Strategy	Value Exchange (8)	Value co-design	Social marketing strategy/set of interventions designed.
	g. Selection of intervention types	Marketing Mix (9)		
3. Do	h. Implementation	Implementation plan guide (10)	Value co-delivery	Implementation plan
	i. Post Evaluation	Monitoring and Strategic Reviews Format (11)		
4. Describe and Learn	j. Results of the evaluation and dissemination.	Dissemination plan outline/elements (12)		Lessons learnt; program experience shared

3.1. ASSESS

This step is the most important and fundamental part of all social marketing interventions and programmes. It involves a systematic collection of behavioral data, study findings, and other contextual information in order to understand the specific social problem to be addressed. It requitres that you examine the problem under a broad lens that the social, economic, political and health context in which the behavior issue exists. Neglecting or minimizing the value of this step would likely compromise the efficacy and success of your program.

a. Problem definition (behavior and target audience selection)

Before initiating any social marketing initiative, it is fundamental to gain a good understanding of the behavioral issue *(benchmark 1)* that you want to address. First of all, you need to define the broad societal problem (e.g., social exclusion), indicate who is affected (e.g., disabled people), where (e.g., APCC organization), and, if known, the extent of the problem (who it affects, people and the system, and its social, health and economic impacts). After this, you should ask yourself if intervening you could bring possible short and long-term impact. To answer this, you need to know the evidence about the issue, the causes, and which type of interventions and communications have been used successfully and unsuccessfully before. This can be accomplished with a review of the literature. The next step requires you to narrow down the problem into specific actions and specific behaviors that you want to address, and to select who are the actors/audiences that will be the primary targets of your intervention. You should select the behaviors based on the behavior change potential, the funding sources and the social impact of the changing behavior. Based on the behavior(s) that you want to influence, you can select who are the people that are going to be targeted. (See Annex Tool 1 for problem definition and audience selection guides).

b. Stakeholder Analysis

Stakeholders are any individuals, groups, or organizations with an interest in your social marketing intervention and outcomes, either as a result of being affected by it positively or negatively, or by being able to influence the activity in a positive or negative way. They can be employees, your target audience, board members, external organizations, "competitors", government, etc. Engaging stakeholders at the beginning of your planning process facilitates allies and joins expertise and resources, and identifies potential conflicts that could jeopardize the program. Engaging with them too late can result in lack of buy in and/or mismatched priorities.

How to conduct a stakeholder analysis

You can start by compiling an initial stakeholder list. For each activity of your program, you list all the main stakeholders that you think might have a role. You can also work in groups or create a workshop for this purpose. Using this list, you can create your stakeholder matrix (see annex for example), in which you will score your stakeholders on influence and importance for the project. This will help you to map them to help you decide how to best relate with them. Considerations: stakeholder analysis is a dynamic process. They can change their position and new stakeholders can emerge in later steps (for example, during the audience analysis new actors could come up). For this reason, the suggestion is to conduct a stakeholder analysis at every stage of your program planning, and continuously communicate with them, keeping them informed about the progresses and seeking inputs. (See Annex Tool 2 for a guide on how to create a stakeholder matrix).

c. Perform situation analysis

Performing a situation analysis will help you understand the key issues that may impact on your proposed program or on the receptivity of your target audiences. This activity involves developing a subjective list of factors which may influence the interventions. A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis is one tool that can help identify relevant issues about the development of a program. It is a well-established method for assisting the formulation of strategy (Dyson, 2004) and can help you understand both internal and external strengths and weaknesses and evaluate external factors that may serve as opportunities or threats to your work.
(SWOT analysis template is provided in Annex Tool 3).

d. Target Audience research and analysis

Understanding the population and segments of populations is necessary to design effective behavior change strategies. Target population research in social marketing includes two stages: desk research and the formative research.

Desk research
Desk research, or document/literature review, is used to better understand the evidence about the problem, current behaviors and their determinants. You can review the problem definition and start developing a search strategy that will help you to find articles and relevant reports about your topic.

Formative research
In this phase you will directly collect each type of evidence about your target to deeply understand your target audience and gather *insights (benchmark 2)*. Here, you need to understand from your target audience which are the barriers and motivators to conduct your desired behavior, as well as behaviors carried out that *compete (benchmark 3)* for their attention. It is also essential for you to understand what the person has to "give" to get the benefits proposed by your initiative *(exchange, benchmark 4)*. Therefore, you should explore why people do not adopt the desired behavior, what are their concerns, how they behave instead of doing the desired behavior, what would motivate them to change, what they value the most etc… Your research will need to be *Xj hi db Zgoriented (benchmark 5)*, that means that it is very focused on the understanding of the target audience. (Jump back on 2.2 section "Social Marketing Benchmark Criteria" if you need to refresh these concepts). Once you have collected the data from your target audience, you can *segment (benchmark 6)* your audience. Segmentation is the division of a population you intend to address into smaller groups who share similar beliefs, attitudes and behavioural patterns so that can target intervention and communication activities to be more effective for all. This process does not simply make you divide your target audience by gender or age, but you will be required to think about people's characteristics, beliefs, understandings, motivations, capabilities, opportunities, and observed behaviours. Once segmented your audience, you can create an "audience persona", that is a detailed identikit of your target audience. It is fundamental that you keep in mind your audience persona throughout the whole next steps. This will help you with an effective and targeted development of a social marketing strategy, intervention, evaluation plan and dissemination strategy. Some formative research tools (in depth interviews, focus groups, and surveys) and audience persona guidelines are provided in Annex Tool 4 and 5.

The importance of Theory

Behavior change *theories (benchmark 7)* are useful to help you understand the factors that can prevent people from modifying their bad habits. You should choose a suitable theory or theories at the beginning to help you analyze the process of behavioral influence and change, as well as to assist with the planning of interventions (French & Gordon, 2019). The programs are more likely to be effective and efficient when a theory is applied in both analysis of behavioral challenges and to guide the planning of programme responses (Halpern et al., 2004). Given the complexity of achieving social inclusion, you should select theories that describe and determine behaviors at different levels of change:

- Individual level theories: describing the behavior of individuals (e.g. Theory of Planned Behavior; Ajzen, 1991; Health Belief Model; Champion et al., 2008);
- Interpersonal level theories: describing the relationship between individuals (e.g., Social Cognitive Theory; Bandura, 1986).
- Community/group/socio-cultural theories: stressing the dynamics of community and socio-cultural structures or institutions, community mobilization and organizational change (e.g., Social Capital Theory; Coleman, 1988).
- Social ecological and system theories: dealing with multiple influencing factors (e.g., Ecological System Theory; Bronfenbrenner, 1979; Quality of Life Model; Schalock, 2010).

We recommend you a combination of theories, rather than using one single theory, to conduct an evaluation at all the theoretical levels (Tones & Green, 2004).

e. Baseline Evaluation

Any social marketing initiative requires a rigorous evaluation plan. The timing of the evaluation is a critical component: evaluation take place before, during, and after a programme (Stead & McDermott, 2011). This will help you to understand whether changes have incurred, providing insights as to why a programme has or has not succeeded, and how it may be improved. According to (Stead & McDermott, 2011) the evaluation should be conducted:
- Prior to the initiative has started, to obtain a baseline measure of the current behavior (during the formative research);
- During an intervention's implementation, to monitor the development and progress of it, so that, if necessary, midcourse corrections can occur;
- After the intervention, to seek evidences that the customers adopted the behavior;
- Long after the intervention, to collect evidences about the effectiveness of the intervention in a long run, or decay, suggesting a need for a programme recall.

Follow these next steps to design the evaluation of social marketing initiatives:

- **Setting Objectives**

Based on the results and evidences collected during the desk and formative research, you will be ready to develop the objectives of the initiative, that will help you to achieve the desired behavioral outcome. The objectives should be SMART and represent the achievements necessary to allow you to reach your goal (based on the social problem, general statements of what you want to achieve).

Develop a set of SMART behavioral objectives:

S	Specific	Precise focus on one variable and set real numbers
M	Measurable	You can observe/collect measures related to the behavior
A	Attainable	Achievable with the resources available
R	Relevant	Consistent, reasonable, result-based
T	Time-bound	Set a deadline within the time frame of the program

Starting from SMART objectives you can start thinking about which are the results you need to achieve, which could be the best strategy you may use to achieve high-quality results, and how you want to collect and measure the data you need. To do this, create your logic frame. (See Annex Tool 6 for guideline on SMART objectives).

•**Develop your logic framework**

The logic framework is a matrix that allows you to represent in a synthetic way the fundamental elements of your project and their causal relationships. These elements represents the 4 different levels of the project, that are: impact, outcome, output and activities, and each level will lead to the other in a logic way (Coleman, 1987; Roduner, 2008).
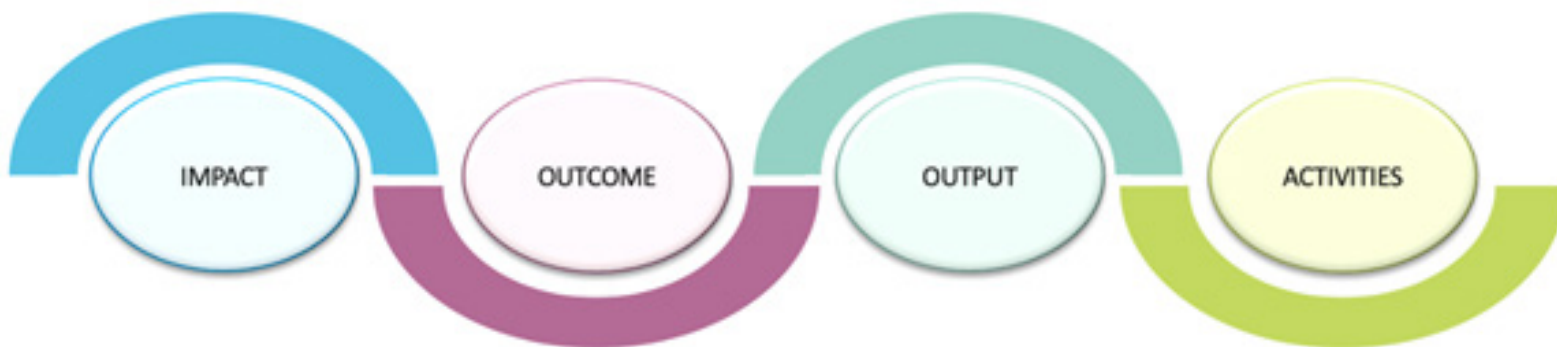
- Impact: it is a positive change in the long-period in a global situation in which the project is developed and in which it seeks to positively contribute. Usually you reach this through the combination of more actors and projects.

- Outcome: it is what you hope to obtain with the realization of the project, utilizing the time and resources available. In other words, the outcomes are the changes that the activities will create. This is the specific objective that you would like to achieve at the end of your project.

- Output: These are the product of the achievements of the activities, and these are concrete and tangible. At each result correspond at least an activity.

- Activities: specific actions necessary to obtain a result (outputs) and therefore, contribute to reach the objective (expressed by the outcomes).

The logic framework will help you identifying which are the logical connections between the objectives of your project, the results that you expect to achieve, and the activities that you want to do. See Annex tool 7 for developing your logic framework.

• **Choosing indicators and evaluation methods**

All the 4 levels of the project analysed before need to be measured, and for this purpose, you need to think about the indicators. This means that you start reasoning on how the data will be analysed and subsequently presented. The presentation of the data include how you want to disseminate your data, and in doing this you should first consider all the different people/stakeholders that will want toknow about the project and its results, including those involved in developing, delivering, receiving or funding the project.

Indicators: the "WHAT"	Data collection: the "HOW"
Indicators are tools to measure the achievement (or not) of your activities, outputs, outcomes and impacts. Indicators of change may include measurements on knowledge (e.g., knowing the harms caused by drugs), perceptions (if people feels at risk), intentions to stop or change a certain behavior, or an actual behavior change (e.g., use of the helplines or purchase of products to stop smoking).	As part of the development of indicators, you then specify how you collect the data. The data collection method is based on what is most appropriate to get what you need, but this includes understanding the feasibility and also what the stakeholders who read the report value and believe in most.
Examples of indicators: • Self-reported behavior change; • Observed change in behavior; • Changes in social climate; • Skills acquisition; • Quality of services provided; • Satisfaction with services or program; • Changes in knowledge /attitudes/ beliefs/ awareness; • Quantity or type of media coverage;…	Here provided some examples: • Interviews; • Surveys or questionnaires; • Focus groups; • Observations; • …

As a next step, you will need to decide when and who is going to do the activities and measure the achievements. See Annex tool 7 for developing the indicators and data collection methods in you logframe.

3.2 DESIGN

Based on the insights and processes above, now you are able to design your social marketing strategy. At this point, you should be having a good understanding of your target audience, analyzed their behaviors set your SMART objectives and developed your logframe. You are ready to create your marketing mix and design your social marketing program, campaign, or intervention. At this stage, you can come up with ideas and initiatives together with your target audience, or planning the programme autonomously, relying on the insights that you have received.

a. Marketing mix

The traditional marketing mix are the 4Ps "product, price, place, and promotion", that you can use to define the details of your intervention. They refer to the creation of the right product, promoted at the right price, and delivered in the right place for the target audience (McCarthy, 1979). We propose here a 6Ps model (Figure 2), with the addition of partnership and policy.
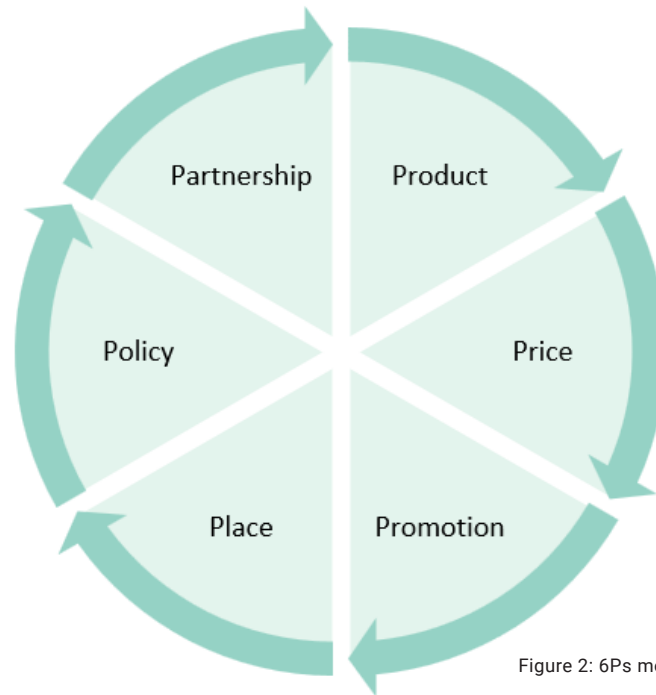
Figure 2: 6Ps model

Let's see them in detail:

Product

Product refers to what behavior are you trying to change, and there are three types of product:

1. Core product: the benefits of the desired behavior; eg improve health, create economic independency, create a solid social network…;
2. Actual product: the behavior you are promoting; eg practice physical activity every week, new job employments, participation in social activity such as movie theaters, art galleries…
3. Augmented product: these are optional to perform the behavior, remove barriers, sustain behaviors and provide encouragement; eg build ramps at the entrance of buildings, create social events, text messages to prompt physical activity…

We can say that product is all the benefits that our target audience obtains from the exchange.

The notion of exchange in developing the product is predominant, in fact, during the target audience analysis you should have explored the costs and benefits in adopting the new desired behavior, and you should be able to offer a valid exchange: what does the interested people have to give to get the benefits proposed? Do the benefits of the new behavior outweight the costs? How audience value your offering and proposed benefits? It is important that you have in mind the behaviors that compete for the time and attention of your audience; therefore, you should give behavioral options accordingly to what people value the most, in contrast with their actual behaviors.

See Annex 8 for exchange proposition and Annex 9.1 for the product template.

Place

Place can refer to two things: where the actual behavior takes place and where the behavior is encouraged and/or supported. Place facilitates the exchange, according to people needs. Place can also be virtual or seen as access possibilities, that is the way in which consumers access the services they require. Remember that a lack of convenient facilities or easy access can be an important barrier to adopting or maintaining the desired behavior.

Price

Price refers to the cost the target audience associates with adopting the desired behavior. Price can be of two types: monetary or non-monetary. The first one refers to physical fees and fines to pay, the second one is about the time, risk, energy, emotional distress, and discomfort (both physical and psychological) that a person has to bear and give in order to adopt the desired behavior. Even if minimizing the first the second can serve as a meaningful barrier. You need to take this into account price when you think about the value-exchange of your product.

Promotion

You can think about promotion as "persuasive communications" designed and delivered to inspire your target audience to action. It includes advertising your initiative, public relations, promotional events, direct mail and so on. Here you will have to decide the nature of the messages, which creative strategy to use, where and who has to deliver them.
See Annex 9.2 to design your message.

Partnership

We can define partnership as when you "bring together a set of actors for the common goal of improving the health of populations based on mutually agreed roles and principles" (Kickbusch & Quick, 1998). A partner is anyone that has a common interest, that has something you don't have or lacks of something that you have, and most importantly, that shares a common goal.
You should involve partners early in the planning process and later in implementation, and for this reason, you could have different partners at different stages.
The key points for a good partnership are:
- Have a shared value, that is represented by filling a societal need;
- Have shared objective(s), that are the factor(s) to be achieved;
- Have a shared approach, that is how will the objective be achieved;
- Have shared outcomes, that are the short and long term indicators of success.

Creating partnerships is really important because it provide mutual benefits for accessing the audiences, to increase the credibility and the influence, and to collect resources and expertise.
N.B: a partner can originally be a stakeholder, but they become partners whether they engage and invest in the project/intervention, both financially or with resources.

Policy

Policy are important factors that can help the adoption or the maintenance of the desired behavior. For this reason, during the development of your program, you should keep track of them and aim at changing policies that hinder the behavior/situation you want to change, and collect the ones that facilitate the achievement of your goal.
Examples of policies can include:
- Increasing or imposing new taxes on unhealthy foods and beverages;
- Increasing the availability of healthy options in communities, schools and workplaces;
- Formalizing community partnership and stakeholder agreements;
- Introducing bans and/or new regulations.

g. Select types of interventions

'Types' of intervention reflect what a strategy aims to do:

CONTROL	INFORM	DESIGN
rules, require, constrain, restrict, police, enforce, regulate, legislate, incentivize	inform, remind, reinforce, explain	physical product, environment, organizational system, technology, process

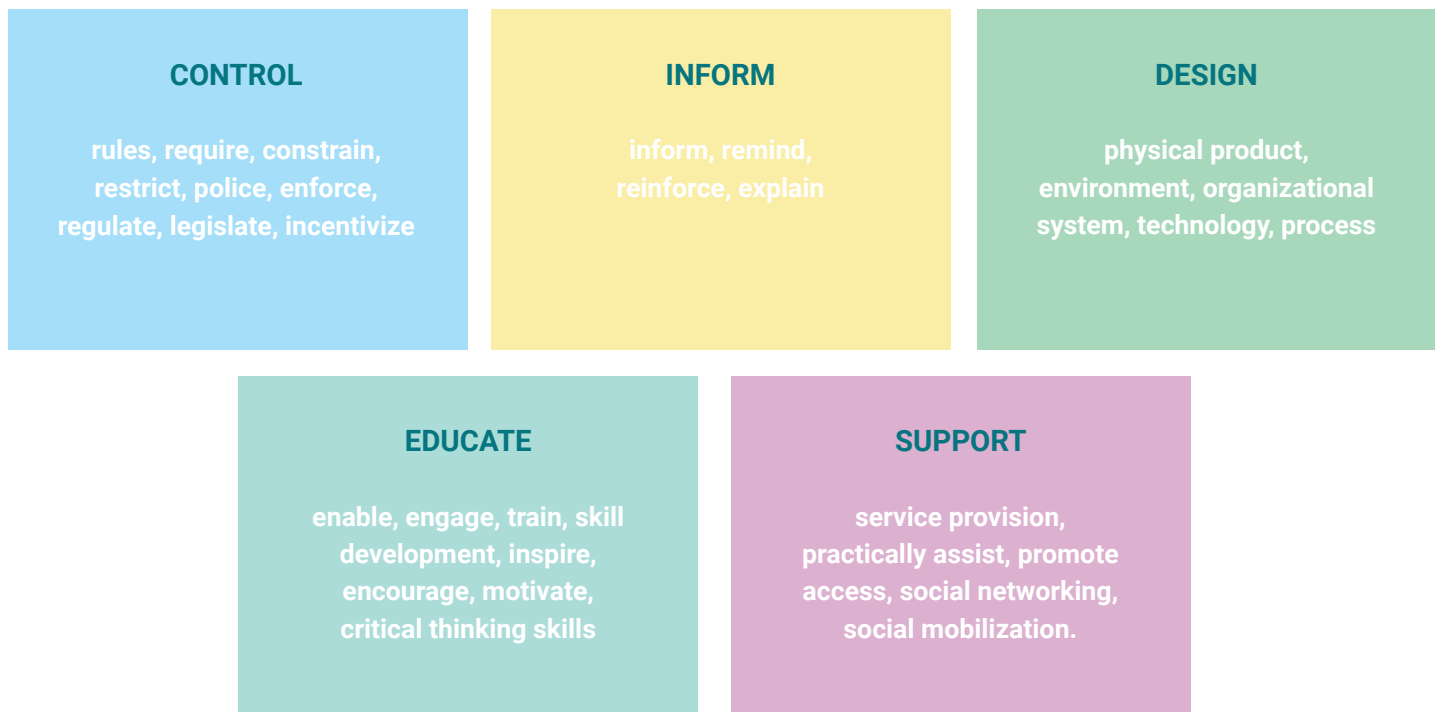| EDUCATE	SUPPORT
enable, engage, train, skill development, inspire, encourage, motivate, critical thinking skills	service provision, practically assist, promote access, social networking, social mobilization.

Figure 3: types of intervention, (French J, Blair-Stevens, et al., 2010).

See the case studies in section 2.3 of the previous chapter to have an example of intervention mix.

You need to decide your intervention relying on what you have discovered during the target audience research, selecting the types and/or forms most likely to have a positive influence.

A combination of different types of interventions (method-mix, benchmark 8) is usually the best option you have to achieve efficiency in the intervention and enhance the overall impact of it. Have a look at Annex Tool 9.3 for interventions template.

3.3 DO

The Do phase moves from the target audience analysis and the design of the programme, to the actual implementation. Once you have implemented messages, products, or activities, you should monitor and evaluate them for their effects, but also for issues needing refinement if necessary.

h. Implementation plan

It is "the process that turns marketing strategies and plans into marketing actions in order to accomplish strategic marketing objectives" (Kotler et al., 2001), breaking the strategy into identifiable steps. You will require a precise project management, defining exactly the actions that you want to be done (what will be done), the responsibilities (by whom), and the timeline (by when). In this regard it could be useful for you to use a planning tool like the Gantt chart. A Gantt chart is a type of bar chart that illustrates a project schedule. On the vertical axis are shown the tasks to be performed, whereas the horizontal axis presents the time intervals in which each task should be performed (Klein, 1999).
(Look at Annex Tool 10 to have a guide on implementation plan).

i. Post evaluation

In this stage, you should have implemented and monitored your intervention, and you are ready to review and evaluate the impact. The purpose of the post evaluation is to learn lessons from past experiences and to identify the strengths and weaknesses of your intervention, determining if it has made a difference. Evaluation reviews how and why tasks succeeded, failed or were changed. You should have decided how you are going to evaluate your intervention earlier in the assessing process and considered a number of key indicators to help with this evaluation. The indicators could measure short, medium- or long-term changes in people's knowledge, attitude, and behavior, or in the context around them. As well as the outcomes, you should keep track of the actual process of the intervention, and combine all the information to be able to write down recommendations for further actions.

(Post evaluation template is provided in Annex Tool 11).

3.4 DESCRIBE

This last phase of the social marketing planning consists in the process of documenting and sharing your results to add and improve the evidences in the specific sector. You should document all the steps of the Assess, Design and Do phases to ensure accountability, transparency, and to improve evidence, so that lessons can be learned about what worked well and what could be improved.

j. Disseminating the results of the Evaluation

You should have started thinking about dissemination during the elaboration of the evaluation phase. When you think about dissemination, you should also consider all the different people that will want to know about the project and its results, including these involved in developing, delivering, receiving or funding that project. What kind of report do they want to read? A traditional printed or e-report, an infographic, a slide desk, a film, or even a post-cast? Typically a report is needed, but can be supplemented with other communications, such as a visual (video, infographic) to stress specific messages.

At this stage you should have elaborated your evaluations of the outcomes from your interventions or programme and also evaluated the contribution of different stakeholders and partners. The aim of dissemination is to report to stakeholders, funders and to all people interested in the programme/intervention the results and a set of recommendations based on what you have found, what worked and what does not in terms of influencing the desired behavior. This is of crucial important because it help make sure that the learning gained from the evaluation phase can help in the efficiency and implementation of future interventions.

It is essential to present the findings in a comprehensible way and contextually appropriate for the stakeholders you need to reach (in terms of culture, sex, disability, etc).

(Dissemination guidelines are provided in Annex Tool 12).

SECTION B

LEARNING CASE STUDIES SIM FOR FRONT LINE PROFESSIONALS (MIDSTREAM LEVEL) AND FOR COORDINATORS AND SUPERVISORS (UPSTREAM LEVEL)

This section includes 4 real case studies with the aim of bringing the reader closer to the problem of inclusion and to see how social marketing can help to solve it. These case studies are intended for front line professionals (midstream level) and/or for coordinators and supervisors (upstream level).

Specifically:

- The case study "Blagichka-Zero Waste" focuses on midstream level.
- The case study "Diversity management–Respons&Ability" is aimed to upstream level.
- The cases studies "I CAN WORK!" and "MARKTH!NK Project" are oriented to upstream and midstream levels.

The first case study "Blagichka-Zero Waste", has been developed by NARHU and is oriented to midstream level, focuses on a restaurant that gives to the young people with disability a chance to succeed despite the constraints caused by the disability. It is the first restaurant following the zero waste principles in Bulgaria, which also provides employment to disadvantaged young people. In this sense, this company tries to promote sustainable behaviour using typical social marketing techniques combined with innovative and profitable business strategy. The social marketing problem to be analysed is to provide workplace and employment to young people with disabilities in a rapidly developing company, which promotes sustainable environmentally friendly attitude in the society. It is a great example how a social cause could be transformed in a successful marketing and business initiative.

The second case study "I can work", was also developed by NARHU and, in this case, is oriented to upstream and midstream levels. It analysis the EU funded project I CAN WORK!, a project that offers support for employment for people with intellectual disabilities and that has been implemented by one of the biggest and most popular Bulgarian NGOs for people with intellectual disabilities – "Maria's world". The social problem to be analysed is empower people with intellectual disabilities in their access to professional support, change the extremely negative attitudes and prejudice towards the employability of people with intellectual disabilities. This case study helps to observe and consider the opinion and points of view of all involved parties as indivisible whole, avoiding the social prejudice and underestimation by demonstration of abilities and strengths.

The third case study "MARKTH!NK Project", was developed by APCC and focuses on upstream and midstream levels. The Markthink project was developed in Portugal, framed in a transnational partnership, with the objective to improve awareness of social responsibility, promoting equality and inclusion in the employment of those who stand in a weaker position in society. The project has a strong focus on Corporate Social Responsibility (CSR) as a creative way to open up companies to new ways of thinking and acting, bring us closer to the realities of society and the social problems of local communities. This case study gives to professionals working in the organizations, some understanding of the potentialities of applying social marketing, either in their own organizations or in actions carried out by them on their target publics.

And finally, the fourth case study "Diversity management–Respons&Ability" has also been developed by APCC and focuses on upstream level. The ResponseAbility project arose from the need for a group of European countries (Portugal, Spain, Lithuania, Denmark, Italy and England), to integrate good practices in the area of social responsibility and diversity management, and to find a set of products that would facilitate the communication and awareness of the entities responsible for these areas. The guiding perspective of this study aims to reflect and make European SMEs reflect on the need to frame diversity, in their human resources management, from a social responsibility perspective, which is increasingly required of European SMEs, due to market imperatives. This project aims to develop tools for decision-making by managers of SMEs to facilitate the integration of people with disabilities in their companies.

According to conceptualization analysed in previous chapters and with the aim to observe a practical application, all the cases studies follow the same structure. That is:

- Social marketing problem to be analysed.
- Audience of the case.
- Learnings.
- Benchmark framework for case studies: contextualization, results, and benchmarks (8 social marketing reference criteria).
- Relationship with inclusion indicators (personal conditions domain, environmental conditions, and employment conditions domain).
- Questions for reflection.
- Question for exam.

CHAPTER 4. CASE 1: LABOUR MARKET INCLUSION

Title of the case study: Blagichka-Zero Waste. **Author:** NARHU

4.1. SOCIAL MARKETING PROBLEM TO BE ANALYSED: To provide workplace and employment to young people with disabilities in a rapidly developing company, which promotes sustainable environmental friendly attitude in the society. Thus the company gives to the young people with disability a chance to succeed despite the constraints caused by the disability; ecological transition of restaurants.

4.2. AUDIENCE OF THE CASE: this case could be of great use of all stakeholders who are dealing with the problem of environmental pollution and the problem of PwDs labour market inclusion.

4.3. LEARNINGS:
1. The benefits of combining two different social causes, which shifts the focus from the problem of social inclusion of people with disabilities and overcomes the effects of social fatigue from talking about this problem.
2. The provision of easy-to follow solutions and alternatives to the targeted people which makes easier for them to follow the desired behavior.
3. It is a great example of how a social cause could be transform in a successful marketing & business initiative.
4. It is a great example of how smaller steps lead to bigger changes. The strategy of the founder is to make people to believe that by just buying a food from her restaurant they do a lot for their health, for the nature, as well as for the people in need all at the same time.

UPSTREAM	MIDSTREAM
	This company provides permanent employment to people with disabilities by which, on one hand, gives them a chance to progress and to achieve better quality of life, on another hand, promotes the working abilities of PwDs to the wider society. In addition the team of Blagichka Zero waste offers **work based mentoring support to those young people with disabilities** without previous experience who otherwise would not have an opportunity to acquire it in a real business environment. This company tries to promote sustainable behaviour using typical social marketing techniques combined with innovative and profitable business strategy.

4.1. BENCHMARK FRAMEWORK FOR CASE STUDIES: BLAGICHKA – ZERO WASTE

Contextualization	**Social Context:** Waste problem: the total amount of generated municipal waste in Bulgaria follows a tendency towards a permanent decrease, as for the period 2008-2018 the decrease is by about 36%. Compared to the EU-27, Bulgaria is below the average level of municipal waste generation per capita per year for 2018 – 489 kg/capita for the EU-27 and 407 kg/capita for Bulgaria, as the main source of waste is households - about 90% of household and similar waste, with the largest amounts of waste generated in the southwest region, where it is located the capital city of Sofia. Despite the favorable trend of reducing the generated municipal waste, in recent years Bulgaria maintains a lower level of recycling of municipal waste than the average for EU member states - 31.5% in 2018, and the indicator of composted municipal waste resident Bulgaria is in one of the last places. **PwDs employment problem:** According to Eurostat data from 2017, **19%** of Bulgarians report the presence of health problems, which hinders their social activity, and **every fifth** Bulgarian over the age of 16 has a long-term physical disability. At the same time, statistics show that Bulgaria is **among the top three countries with the lowest number of people with permanent disabilities** at working age. However, despite this low number, people with disabilities in the country continue to face many obstacles that prevent them from fully exercising their fundamental rights, including their right to work and employment. This results in a big share of people with disabilities who are at risk of poverty or social exclusion – in 2018 they were 49.5% or 19.5 percentage points higher than for people without disabilities, and 20.7 percentage points above the EU average. The employment rate of people with disabilities in Bulgaria continues to be one of the lowest in the EU (39.5% compared to the EU average of 50.7%), with a very large difference compared to people without disabilities (34.2 percentage points compared to the EU average of 24.2 percentage points). **BLAGICHKA – ZERO WASTE** is the first Bulgarian business initiative, simultaneously dedicated to overcoming the problem of environmental pollution with waste and the lack of equal opportunities for employment of young people from vulnerable groups. It is the first restaurant in Bulgaria which both **follows the zero waste principles and provides employment to disadvantaged young people**. The restaurant is established in 2018 in Sofia - the capital of Bulgaria and still functions successfully, despite the negative tendencies in the Bulgarian business environment due to Covid-19. The founder of the restaurant and her team managed to avoid the negative attitudes and social fatigue of society concerning the problems and activities to support its most vulnerable members by focusing the public's attention primarily on the problem of environmental pollution with waste and afterward to the one with vulnerable young people's employment.

	They in the first place promote **BLAGICHKA – ZERO WASTE** as the first restaurant in Bulgaria which adheres to the principles of the **Zero waste** concept. This means that they are not just disposing of their waste separately and recycling it, but try to *create as little waste as possible*, for instance, by not buying products in disposable packaging but only goods and products which wrappings are made of paper, glass, or some kind of natural fabric, and in some cases aluminium and reusable plastic. By this, **BLAGICHKA – ZERO WASTE** promotes the *responsible and conscious shopping* – the team is trying to reduce their waste by *buying only what they need, replacing disposable products* such as plastic bags, cups, utensils, etc. *with reusable ones*, and of course the *separate disposal* of what remains unused.
	Meanwhile, the other main mission, proclaimed by the founders of the restaurant, is to *provide employment opportunities* to young people with vulnerable backgrounds, and more concretely – young people with disabilities. So far they have been employing mainly young people with hearing impairments or deafness.
	And this all is reflected in the slogan of the restaurant which is "**BLAGICHKA – ZERO WASTE** the first zero-waste restaurant in Bulgaria! Order real food for yourself and give young disadvantaged people a chance to progress!"
	The objectives that the founder of *BLAGICHKA – ZERO WASTE* is pursuing through this project are:
	1. promoting the idea of responsible consumption;
	2. demonstration of socially responsible behavior in relation to the problems with the environment and the problems of the vulnerable members of the society;
	3. combating social stereotypes regarding people with disabilities;
	4. promoting the career development of young people with disabilities and improving their quality of life;
	5. counteraction to the pollution of the environment with household waste;
	6. implementation of the composting method in an urban environment.
Results	The founder of **Blagichka – Zero Waste restaurant** – Blazhka, discovered that the most effective way to protect the environment is by achieving a long-term change in people's consumption habits which brings her to the zero-waste concept of living. She also found out that the best strategy for influencing people's behavior is to demonstrate the desired behavior by herself. In addition, she believes that she should consider a different initiative to reach more people directly in front of whom to demonstrate this way of life. So, firstly, she did a **segmentation** of the target groups, then she observed **what prevents** them from achieving a durable change in their behavior. She thus concluded that she must have offered them a simple and easy way to incorporate the principles of the zero-waste concept into their daily lives, while at the same time demonstrating to them how accessible and easy this is through her own example.

Results	She came up with an idea to open a restaurant, which on the one hand would offer healthy, natural homemade food to the busy young people, and on the other would allow her to present how easy it is to apply zero-waste principles in everyday life, and how easy and satisfying it is to have prosocial behavior and help the people with certain disabilities.

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What she did by opening this restaurant is to offer such people an easy way to adopt environmentally friendly and socially responsible behavior by just buying food. She proclaimed that when doing so, people would not just receive healthy and delicious food but would also:

• Support the smaller and local food suppliers, smaller local shops, as the restaurant cooperates only with such entities;

• Save the environment by not buying large quantities of products so as not to throw them away afterward and by receiving a zero-waste product, that each part of it could be composted.

• Support young people in need enhancing their employment opportunities and career development, as the restaurant provides employment and internship opportunities to vulnerable young people, especially to the ones with disabilities;

• Support elderly people in need who are living alone, as the restaurant providing them with hot meals every day by giving them the food left;

• Support the composting culture, as the restaurant makes and maintenance composters for organic waste.

BLAGICHKA – ZERO WASTE RESTAURANT has been operating for 3 years so far (2018-2021) and they remain stable on the market besides the challenges for this business segment due to Covid-19. It is an ongoing "business initiative" that proclaims:

1. socially responsible behavior with regard to the problem of environmental pollution with municipal waste by encouraging people to reduce their household waste;

2 inculcation of zero waste principles in home and in business environment;

3. providing social support to vulnerable young people to achieve professional development and long-term employment.

For the last three years, the team of **Blagichka – Zero Waste** achieved the following results:

1. Quantitative

• Two months after the opening of the restaurant and placement of the composter, **10 couples** from the same neighbourhood where the restaurant is placed started composting their organic waste in the **Blagichka – Zero Waste** composter. Nowadays, **Blagichka – Zero Waste's** composter becomes like a neighbourhood composter – **most of the people** from the neighbourhood are composting their organic waste there.

Contextualization	• They have created a **second composter** only with the help and support of their customers; • They have provided job to **6 people** (besides the founder and her partner), while in the beginning, they were just 2 – the founder and her partner. • They have provided permanent job places to **young people with hearing impairments**. First, they have hired **two** young people with hearing impairments, Nowadays, **half of the employees** in the restaurant are people this type of sensory disability. Actually, since its opening, the restaurant has provided internship opportunities to vulnerable young people but their number is not specified; • Their FB page has **8584 followers**; • **129** permanent clients, registered on their website; **2. Qualitative** • **Blagichka – Zero Waste** restaurant remains stable even during this pandemic situation, they are well-positioned in the market although they are functioning mainly by selling fresh and organic food for the home, as well as by making home-deliveries. • Recently they have increased their service portfolio by starting an internet shop for sweets and drinks. • Receives score 5 of 5 FB, by their clients. • In 2020 the founder Blazhka Dimitrova issued also a book "Life with zero waste in Bulgaria". The experience and methodology provided by **BLAGICHKA – ZERO WASTE** could be observed as a successful approach for the removal of social resistance to concrete public problems and/or imposed social changes that could be of great use for social entrepreneurs, social workers who work with vulnerable groups, young people and people from the wider society who would like to promote measures and activities for social support of vulnerable people and encourage positive behavioural and social changes in the wider society.

Benchmarks (8 Social Marketing reference criteria)

| **Customer orientation** | As the founder of **Blagichka – Zero Waste** restaurant is one of the first zero-waste cause ambassadors in Bulgaria, she has been working with many people who want to change their waste habits by start following the principles of Zero waste. Before the restaurant, she has been establishing an NGO providing advice to these people on how to replace various products and how to change their habits.

Thus, Blazhka had a chance to work with many people and to explore their attitudes. Based on her experience, Blazhka finds that **younger and more dynamic people who try to lead a healthy and expedient lifestyle** are most motivated to follow a zero-waste concept and more easily achieve a change in their behaviour and she starts developing a service portfolio targeted mainly to them.

However, her ambition is to spread the zero-waste way of living to the **wider society** and to motivate as many people as possible to consume in a responsible manner and to have prosocial behaviour. The desired outcomes for **Blagichka – Zero Waste** are:

1. more people from the wider society and entrepreneurs to demonstrate responsible consumption and socially responsible behaviour in relation to the problems with the environment;
2. more people and employers to demonstrate a willingness to deal with the problems of the vulnerable members of the society;
3. people with disabilities to become "more visible" to the wider society and the business and to receive opportunities to demonstrate their talents;
4. more young people with disabilities to receive a chance for career development and to improve their quality of life;
5. to implement the composting method in an urban environment. |

Behaviour	Through their experience **Blagichka − Zero Waste** try to encourage the following long-term changes in people's behaviors:
	
	Wider society
	   • Responsible consumption, by reducing the number of purchases, incl. spontaneous ones, for the households and shopping from smaller and local food suppliers and shops (indicators: increased number of the market-stable smaller shops and food suppliers);
	   • Responsible attitude towards environmental protection (indicators: increased buying of goods and products wrapped in reusable wrappings, increased use of reusable containers for storage of water and food);
	   • Volunteering for environmental causes (indicators: increased number of the volunteers and causes);
	   • Recycling and composting of waste (indicators: increased implementation of composters in households and increased number of people who become followers of the recycling and composting principles);
	   • Good predisposition and acceptance to the people with disabilities (indicators: willingness to communicate, cooperate and work with PwDs in different domains).
	
	Corporate bodies (incl. media)
	   • Implementation of the zero waste cause, both in their functioning at the operational level and as their corporate socially responsible cause (indicators: allocating funds to promote such NGO initiatives; selecting small companies and suppliers that adhere to these principles in order to promote their sustainability in the market, etc.);
	   • Promoting recycling and composting of waste among their clients and employees (indicators: introducing a policy to encourage employees to demonstrate the desired behavior, preferential prices for customers who demonstrate the desired behavior, launching an advertisement, etc.);
	   • Encouraging perseverance and commitment to the zero-waste cause (indicators: introduction of incentive measures and sanctions in this direction, provision of various social benefits among employees and partners for adhering to the desired behavior, etc.)
	   • Respecting the people's diversity (indicators: increase number of the employees with a vulnerable background; cooperation with social enterprises and small companies run by people with a vulnerable background or employing such people, etc.)
	   • Acceptance and inclusion of PwDs (indicators: adhering to the quota principle for hiring PwDs);

Behaviour	**PwDs** 　• Active citizenship and positive self-esteem (indicators: increased number of PwDs participants who take part in various civic initiatives; increased number of PwDs who run and/or support civic initiatives); 　• Ambitious and proactive behaviour (indicators: increased number of PwDs who are seeking a job by self-promotion to employers and active online job-application, increased number of PwDs who achieved employment, professional qualification, career development, etc.); 　• Responsible consumption (indicators: increased number of the market-stable smaller shops and food suppliers); 　• Responsible attitude towards environmental protection (indicators: increased buying of goods and products wrapped in reusable wrappings, increased use of reusable containers for storage of water and food); 　• Volunteering for environmental causes (indicators: increased number of PwDs who act as volunteers); 　• Recycling and composting of waste (indicators: increased implementation of composters in their households and increased number of PwDs who become followers of the recycling and composting principles).
Theory	**Social learning theory – A. Bandura** In a very general way, we can say that in order to achieve the goals of her cause, Blazhka subjects her strategy to the theoretical statement of A. Bandura, according to which a person can be accustomed to certain behaviour while observing how others behave and when he sees what are the consequences of their behaviour. Through her business success and the ease she demonstrates in observing the zero waste principles and in promoting the professional realization of young people with disabilities, Blazhka first motivates a positive change in the behaviour of people from the small community of the neighbourhood and subsequently influences large groups in Bulgarian society.
Insight	During her zero-waste NGO activities, Blazhka the founder of Blagichka – Zero Waste restaurant, has discovered that **what prevents** people from demonstrating more socially responsible behaviour is that they do not find an easy and simple alternative to their conventional way of living. Also based on her previous experience, Blazhka finds that younger and more dynamic people who put efforts to lead a healthy and expedient lifestyle are most motivated and open to demonstrate the desired behavior and that she could attract them first to the idea and then make them like ambassadors who to bring the idea closer to the other members of the wider society.

According to Blazhka's experience, the young and active people who try to lead more healthy and expedient lifestyle are more:
o open to adopting environmentally friendly behaviour;
o open to social diversity and individuality;
o open to accepting people's "otherness";
o open to participate in volunteering initiatives;
o receptive to new ideas, and changes if offered easily applicable alternatives;
o communicative and maintain a wider network of contacts with people of different ages and social groups.

So, what she has found that **best motivates** young people to demonstrate desired behavior is in the first place to be provided with a **simple and easy way** to incorporate it into their daily lives.

Exchange	**Spending of financial resources:** • Investing personal funds as an initial investment in reusable products that cost significantly more on the market; • Investing personal funds or taking a loan to finance the start-up - costs for registration, production of a website to promote the cause and the activity of the restaurant; • Additional hiring of people to manage and maintain the activities of the company – costs for salaries, social insurances, etc.; • Investing funds for initial and upgrading pieces of training; • Investing additional financial resources for buying organic goods from local and smaller producers. **Spending of non-financial resources:** • Time - dedicating a large part of personal time to supporting the cause (interviews, blog, personal support); • Social capital - contacts, acquaintances, social networks, etc. **Benefits:** • Providing alternative products and goods to compete with mainstream consumer goods; • Opening new job opportunities, including for young people with disabilities; • Increasing the number of people demonstrating socially responsible behaviour; • Joining a large global network of zero waste, which enriches the experience, knowledge, opportunities, etc. • The satisfaction of doing something meaningful and sustainable.

	1. For achieving their objectives, Blagichka – Zero Waste dedicate a large part of personal time to maintain a website, FB page, and blog, as well as to give interviews and to participate in various events (organised by NGOs, governmental organisations, etc.). The purpose is to popularise the zero-waste cause and the problem with PwDs employment but also in order to save financial resources for the advertisement of the restaurant. **2.** Investing personal funds in reusable products that cost significantly more on the market for providing the clients with an alternative zero-waste product which makes it easier for them to follow the desired socially responsible behaviour and thus increasing the total number of people who follow this concept of living. **3.** Investing funds for initial and upgrading pieces of training for the employed PwDs which prevents from dedicating a large part of the other employees' personal time to train their colleagues with disabilities and help them to sustain at their working place.
Competition	Mainly **external** actors compete for the time and attention of the targeted audience. In the first place, these are the large corporations, which have the resources to produce more attractive and cheaper products and goods, to conduct bigger mass marketing campaigns, and which have a greater influence in defining key measures in environmental protection and conservation policies. In the second place, these are the **conventional restaurants** and f**ast food providers** which provide food and delivery at cheaper prices, as they do not invest additional resources for eco-food and reusable or composted packaging of their meals. We can identify as potential internal competitors the young colleagues of PwDs employed in **Blagichka – Zero Waste** who work under same conditions but do not receive explicit public acknowledgment by the society about their employment. In fact, in the mass media it was widely promoted that the restaurant provides workplaces for young people with disabilities, but it was rarely mentioned that other young people employed there were also provided with the chance to gain work experience – being employed in a modern and eco-oriented restaurant.

Segmentation	As it was previously said, Blagichka – Zero Waste is targeting a behavioural change at the level of the wider society. However, during her experience as a zero-waste activist, the founder of the company finds that younger and more dynamic people who try to lead a healthy and expedient lifestyle are most motivated to follow a zero-waste concept and more easily achieve a change in their behaviour. Usually, such young people are very active in different domains, including social entrepreneurship, and support various social initiatives and movements for social change. That is why they could be divided into the following sub-groups, belonging to the midstream level:
	
	Young people who:
	  • Are members of eco-responsible NGOs;
	  • Are members of NGOs operating in the "disability field";
	  • Support the "eco-friendly" way of living";
	  • Are part of so-called "green companies";
	  • Are part of the vegan society;
	  • Are part of the vegetarian society;
	  • Are active volunteers;
	  • Run or work in social enterprises;
	  • Work with or provide support to PwDs (social workers, disability experts…);
	  • Run the small family business (food suppliers, shops, etc.).

Methods mix	**Support** • Discount in buying reusable goods **Behaviours that aims to address** • Encouraging commitment and perseverance to the zero-waste cause • Promoting the zero-waste way of living **Competitors that aims to overcome** • The bigger corporations that provide goods and services at cheaper prices **Educate / Informal training** • Organisation of cooking courses with homemade recipes **Behaviours that aims to address** • Promotion of responsible consumption and "slow eating" • Encouraging commitment and perseverance to zero-waste living by demonstrating how to find zero-waste alternatives in the food making in our everyday living **Competitors that aims to overcome** • Fast food providers and conventional restaurants who provide cheaper but unhealthy fast food

Support

• Discount in buying reusable goods

Behaviours that aims to address

• Encouraging commitment and perseverance to the zero-waste cause

• Promoting the zero-waste way of living

Competitors that aims to overcome

• The bigger corporations that provide goods and services at cheaper prices

Educate / Informal training

• Organisation of cooking courses with homemade recipes

Behaviours that aims to address

• Promotion of responsible consumption and "slow eating"

• Encouraging commitment and perseverance to zero-waste living by demonstrating how to find zero-waste alternatives in the food making in our everyday living

Competitors that aims to overcome

• Fast food providers and conventional restaurants who provide cheaper but unhealthy fast food

Educate / Informal training

• Preparation of raw and vegan food and organisation of cooking courses with raw and vegan recipes

Behaviours that aims to address

• Encouraging commitment and perseverance to the zero-waste cause of the people who are part of the vegan society

• Attracting to the zero cause of people who for medical or other reasons need to change their eating and consumer habits

Competitors that aims to overcome

• Larger corporations that provide ready-to-serve vegan food at cheaper prices

Design / Inform

• Attractive presentation of the daily menus and prepared food at the website and FB page of the restaurant, according to the principles of the food photography.

Behaviours that aims to address

• To attract younger people as customers and as zero-waste followers (as we know younger people reacts better to visual data than to text)

Competitors that aims to overcome

• Larger corporations and food brands that invest a large amount of money for attractive advertisements.

4.1. RELATIONSHIP WITH INCLUSION INDICATORS

Personal conditions
Economic conditions
Environmental conditions
Availability of social networks/partnerships
Social participation
Participation in civic activities/initiatives
Employment conditions
Respect for difference
Socially responsive employment
Economic remuneration

4.2. QUESTIONS FOR REFLECTION

o **Summarise in few sentences the essence of the problem in this case study:**
o **What is the main challenge?**
o **What causes the problem?**
o **Who is affected by the problem?**

o **How were the different social causes combined?**
o **Summarize the two causes.**
o **Explain how they were mixed.**
o **What would you do differently?**

o **Why is this an example of midstream social marketing?**

o **How were the social causes transferred into a successful marketing & business initiative?**
o **What solutions were found?**
o **What can be improved or added in the future?**

o **Why is this considered a social marketing intervention?**

o **Did they choose the most apporpirate behaviors to change and focus on?**

o **What change does Blagichka want to achieve by employing young people with hearing impairments in the restaurant?**
o **What else can she do to support this cause?**

o **How well did they strategically use the costs and benefits analysis / exchange analysis? How did they do it?**

o **Please, list up to 3 characteristics of social marketing included in this case-study and another 3 characteristics typical for disability sector.**

CHAPTER 5. CASE 2: EMPOWERING PEOPLE WITH INTELLECTUAL DISABILITIES

Title of the case study: I CAN WORK!. **AUTHOR**: NARHU

5.1. SOCIAL MARKETING PROBLEM TO BE ANALYSED: empower people with intellectual disabilities in their access to professional support, change the extremely negative attitudes and prejudice towards the employability of people with intellectual disabilities.

5.2. AUDIENCE OF THE CASE: This case could be of great use of all stakeholders who deal with the employment problems of people with intellectual disabilities, including:
• social workers, job couchers, career councellers who support people with ID;
• family members of people with ID;
• employers & HR specialists who demonstrate prosocial and socially responsible behavior who are willing to hire people with ID as their employees;
• local authorities and midstream level experts from public institutions who advocate for development of mechanisms and programs of support and promotion of people's with ID employment.

5.3. LEARNINGS:
1. The strategy should not directly oppose the social prejudices, but take advantage of their uncertain basis and imbalance them simply by demonstrating unexpected behavior/abilities.
2. To observe and take into consideration the opinion and points of view of all involved parties as indivisible whole, not to oppose them to each other.
3. Social prejudice and underestimation should be combated mainly by demonstration of abilities and strengths.

UPSTREAM	MIDSTREAM
Supporting the employers who would like to hire people with ID **by making a proposal to the legal authorities for changes in the regulations** in the field of PwDs employment that would guarantee the application of "I can work" model, as well as roadmap for recommended additional normative changes.	**Empowering people with intellectual disabilities** in their access to professional support, systematically guaranteed and secured in the long run, for their realization in the labour market. **Enhancing the skills of professionals who support people with ID in the process of searching for suitable employment and job retention** by offering a model comprised of various techniques and practical dmeonstrations of abilities and skills of people with ID.

5.4 BENCHMARK FRAMEWORK FOR CASE STUDIES: I CAN WORK!

Contextualization	**Social context:** There are 46,000 people with intellectual disabilities in Bulgaria, of which 8,000 live in the capital city of Bulgaria – Sofia. Unfortunately, these people still remain "invisible" for Bulgarian society and despite the existence of various regulations and measures for increasing the equality **of people with intellectual disabilities, they still receive little support in achieving employment and professional realisation. Still, finding a job is a major challenge for people with intellectual disabilities, especially for the younger ones**. They still are being stigmatised as "useless" and "not able to lead a normal life" which often results as isolation and violation of their human rights, among which is the fundamental right to work. The project „I CAN WORK! Support for employment for people with intellectual disabilities" is an EU project, funded under the EEA Financial Mechanism implemented by one of the biggest and most popular BG NGOs for people with intellectual disabilities – Maria's world in partnership with the Bulgarian Center for Non-Profit Law. It is an 18-month project which started on <u>6th November 2019 and finishes on 6th May 2021.</u> Maria's world organization has been founded by family members of a young woman with an intellectual disability named Maria in 2012. Maria's world team upholds the belief that each person is a valuable resource of the community and deserves the chance to develop their potential and live with hope for the future. That is why for more than 10 years the team fights for the freedom and equality of people – the freedom to make their choices and equality in their accomplishments. The project „I CAN WORK! Support for employment for people with intellectual disabilities" is a natural continuation of Maria's world's efforts in this direction. The project's aim is related to **empowering people with intellectual disabilities** in their access to professional support, systematically guaranteed and secured in the long run, for their realization in the labour market, as well as to encourage the **employers** to hire PwDs. The **specific objectives** of the project are: • development of a **model for support for employment,** based on a needs analysis and in accordance with the national regulatory requirements; • validating the model and providing **support for 30 people with intellectual disabilities**; • preparation and conducting of pieces of training for civil organizations and social services providers for application of the model; • preparation of a proposal for legal regulation for the application of the model and roadmap for normative changes with the active involvement of the stakeholders and the institutions of the central government.

Results	As the project is still ongoing till May 6th, 2021, the information for the achievements of the project and its results could not be provided. However, we could report that on an ongoing basis, thanks to the project's initiatives: • 30 people with intellectual disabilities received personalized individual support for the development of working skills; • 16 organisations – PwDs service providers have been included in training on how to apply the methodology. On the midstream level, thanks to the Lobbying and the organisation of mass media campaigns and informative events within the project, the team of professionals from Maria's world succeed to: • Involve policymakers from the leading party in BG in the discussion and movement for the rights of people with intellectual disabilities. • The employment experts from Maria`a world have been invited to take part in the establishment of a working group to the BG Ministry of labour and social policy, which is appointed to deal with the development and sustainability of a new social service in Bulgaria entitled "Support for the development of work skills"; • Engage the BG Ministry of labour and social policy in the development of a system for validation of acquired skills of people with intellectual disabilities. As far as it concerns the change of attitudes and beliefs towards the work potential of people with ID, it can be reported that the young people and even employers who observe how people with ID work and serve clients in the local cafeteria they become more confident and unbasied towards the real abilities of these disadvantaged group in the society. After the end of the project, it is expected the team of Maria's world to evaluate the long-term impact which project will have on the employers' behaviour by collecting data about the number of people with ID who have been hired as employees or trainees in the country, as well as to measure the level of satisfaction of both parties – employers and employees with ID.
Benchmarks (8 Social Marketing reference criteria)	
Customer orientation	For targeting purposes, the team of Maria's world conducted a study, examining the expectations and needs of people with intellectual disabilities regarding their successful inclusion in the labour market, and the perspective of employers and supportive relatives of people with intellectual disabilities. Qualitative in-depth interviews were conducted with **21 people** with intellectual difficulties, their relatives, supporting persons, and employers. The selected participants were:

• 11 people at the age between **21 and 37** with intellectual disabilities who visit the daily centre within "Maria`s World" – 6 of them are people who participate in work practice without payment and 5 are employed in the BG labour market;
• 3 people who are parents of people with intellectual disabilities;
• 3 people – employment mentors of people with ID;
• 4 employers of people with intellectual disabilities.
For the survey purposes, Maria's world team created different types of structured interview questionnaires for the different participants (3 groups of people with intellectual disabilities, depending on their role concerning the labour market, parents, employers, and employment mentors).
Based on the qualitative analysis of the survey results, the team of Maria's world:
• Identified the groups of people who could or do provide targeted support to people with intellectual disabilities with regards to their inclusion in the national labour market;
• studied the needs for support of people with intellectual disabilities and their difficulties in entering the labour market;
• studied the expectations and difficulties of employers, support persons, relatives, and organisations, in terms of support for employment of people with intellectual disabilities;
• identified good practices in the field of social inclusion and employment of people with intellectual disabilities applied in the country;
• formulated recommendations regarding the support for employment of people with intellectual disabilities based on the opinion of the representatives of target groups and stakeholders and the analysed experience in social practice.

Behaviour	**Behaviour that needs to be adopted by the employer:** • Objective recognition of the working abilities, interests, and skills of people with intellectual disabilities from the employers; • Respecting the diversity at the working place; • Respecting the need of people with intellectual disabilities for individualised and ongoing work-based support and readiness to provide such; • Willingness to hire people with intellectual disabilities as employees; • Flexibility with regards to the adaptation of the working places and tasks of the employees with intellectual disabilities.

	Behaviour that needs to be maintained by the family members and professional supporters of PwDs: • The readiness of professionals and family members to support people with intellectual disabilities in achieving their professional realisation. • Willingness on the family members and professional supporters to promote people with intellectual disabilities as able employees. • Stimulation of the people with ID for the development of practical skills and increasing their self-esteem. The behavior of **people with intellectual disabilities** that needs to be modified: • Enhanced self-esteem and self-confidence of people with intellectual disabilities; • Motivation to develop practical skills and working abilities; • Demonstration of active behavior in the job-applying process.
Theory	When it comes to the inclusion of people with disabilities, especially people with intellectual disabilities in the labour market, the main and insurmountable obstacle to the process is, in fact, the social attitudes of the wider society. Regardless of the number and variety of legislative initiatives and organizations working in this direction, the inclusion of people with intellectual disabilities in the labour market will continue to be an unattainable goal until a mechanism is found to counteract and waver negative social attitudes towards the group of people with intellectual disabilities. Knowing all this, the team of Maria's World provokes negative social attitudes towards people with intellectual disabilities, by applying Fritz Heider's theory of cognitive balance. According to this theory, the disturbance of cognitive balance in the perception of another person provokes the natural motive to restore one's psychological balance, which is manifested in a change of behavior and the way of rebuilding the attitude towards the respective person and the objects common to them. In other words, if we have a situation in which Z likes the object X, but does not like the other person Y when Z realizes that Y has created X, this will cause him an imbalance and he will be motivated to restore his cognitive balance by: A) deciding that Z is not that bad though; B) deciding that X is not as good as he thought before; C) concluding that Z did not really do X. Maria's world team applies this theory in their practice trying to provoke a positive change (Z is not that bad though) in the attitudes of others. They offer to the people a product provided entirely by people with intellectual disabilities, and more specifically – a portfolio of services. Young people with intellectual disabilities serve customers in the Sheltered cafeteria of Maria's World and provide catering services as part of the team of "Catering Bon Appétit". The quality of the provided services and the demonstrated abilities by the people with ID imbalanced the negative attitudes of their clients and the effect is that they are not anymore seen as "unable to manage their life" but as potential employees.

Insight

Based on the survey results, the team of Maria's world identified that:

• Lower self-esteem of people with intellectual disabilities and underestimation of their work capabilities by family members and support persons are among the main reasons for the poor realisation and inclusion of people with intellectual disabilities in the labour market.
• Most of the employers have extremely negative attitudes and prejudice towards the employability of people with intellectual disabilities – often they find them unable not only to work but even to lead a normal life.
• There is a misunderstanding regarding the supporting needs of people with intellectual disabilities among the supporting people and professionals who are dealing with people with intellectual disabilities – more often than not, they consider that such support is needed only at the stage of job searching and placement, while both the job seekers with intellectual disabilities and their employers claim that the employees with intellectual disabilities, as well as their colleagues and employers, should receive ongoing support in the work environment, as it should be provided during the working process as well.

In the "I CAN WORK!" project they decide not to confront the social prejudices towards people with intellectual disabilities but to take advantage of the underestimation to which people with disabilities are subjected by the wider society. The project's team of professionals are aware that against the background of these social expectations, and demonstrated skill by a person with intellectual disability, no matter how significant it is, will have a serious impact on the opinion of the representatives of the wider society and will shake their strongest beliefs and entrenched stereotypes about the general inability of people with intellectual disabilities.

Exchange

According to the "I CAN WORK" survey findings and the professional experience of Maria's world, the need for support of people with intellectual disabilities in the overall process of preparation, inclusion, and preservation of employment requires a wide range of common activities on behalf of the person himself, his supporting persons and employer. This for sure imposes investment of additional resources – financial and non-financial, both on behalf of the employer and the supporting persons of people with ID:

Financial costs:

- Additional payment for the people who are going to supervise the work of the employees with intellectual disabilities;
- Additional costs for securing and adapting the workplace;
- Sustaining certain financial losses in the period of adaptation of the person with intellectual disability to the workplace and the performance of work tasks;
- Costs for education and training of support persons for people with disabilities;
- Additional state funding for the provision of on-the-job support to the person with intellectual disability.

Non-financial costs:

- Dedication of additional time and efforts on behalf of the management and midstream staff for welcoming and including their new colleague with intellectual disability to the team;
- Temporary lower productivity of the team or the unit where the person with an intellectual disability is being placed;
- Possibilities for temporary increased interpersonal conflicts in the working team;
- Changes in the organizational dynamics of the company/organisation.

Benefits:

- Improving the motivation of the employees and the managing staff and strengthening of their interpersonal relations;
- Positive impact on colleagues, clients, and organizational culture;
- Building an inclusive work and cultural environment;
- Improving the public image and the reputation of the company/organisation as a socially responsible employer;
- Access to new markets and customers that encourage and support the socially responsible corporate behaviour;
- Provoking business ideas and innovations;
- Increasing the number of people demonstrating socially responsible behaviour;
- Financial and non-financial support by the state, as well as by international funds for the employers who hire people with intellectual disabilities;
- The satisfaction of doing something for the benefit of society.

Competition	Both internal and external competitors were identified in the project. The desired change in BG employers' behaviour and opinion towards people with intellectual disabilities still faces strong **internal resistance**. Unfortunately, the employment of people with intellectual disabilities is still seen more as an act of mercy and compassion than as an act of foresight, both by the employers themselves and by the Bulgarian society as a whole. The abilities and skills of people with intellectual disabilities continue to be underestimated, which reflects on their self-esteem and motivation and hence on their overall performance in the labour market. On the other hand, **external** obstacles hamper the employment of people with intellectual disabilities. Institutionally and normatively, it is not envisaged that people with intellectual disabilities receive individual representation and advocacy or targeted support but rely on such in the context of the general policy for support of people with disabilities in the labour market. However, as we know, people with mobility impairments, for example, can achieve emancipation and independence much more easily, often only by the provision of necessary improvements in the architectural environment, while people with intellectual disabilities need long-term and targeted support to master the performance of their working tasks. That is why they are often further discriminated against by employers at the expense of people with other types of disabilities.
Segmentation	Based on a conducted study, the team of Maria's world made the following segmentation of the targets, based on their expectations and needs regarding the employment abilities of people with ID: • **people with intellectual disabilities whose** needs for support difficulties in entering the labour market have been explored and based on this has been developed a methodology for targeted support with regards to their inclusion in the national labour market. • **parents and relatives** of people with intellectual disabilities whose expectations and difficulties have been observed and based on this - they have been provided with guidance on how to support their family members with ID; • **employment mentors** (professional supporters) of people with ID who shared the difficulties and challenges they face when providing individual support to people with ID and have been provided with good practices in the field of social inclusion and employment of people with intellectual disabilities applied; • **employers** whose opinions and experience have been explored and based on this they have been provided with good examples for the working abilities of people with ID, as well as with good practices in the field of inclusion of people with ID in the working environment. The project and the study overall are primarily oriented to meadstream level professionals who are usually in charge of the implementation of policies for employment and support of people with disabilities.

Methods mix	Based on the segmentation process, the team of Maria's world applies the following methods: **INFORM:** For overcoming internal resistance of the **employer**s regarding the hiring of people with intellectual disabilities as their employees: • Demonstration of the working skills of people with ID in a real working environment, by hiring them in the sheltered cafeteria of Maria's world and participation in thematic fairs for demonstration and selling of goods and products produced by them, as well as offering catering services to companies and event organisers; • Organisation of information events, workshops, etc., dedicated to the promotion of the abilities and mechanisms for skills acquisition of people with intellectual disabilities; • Organisation and participation of mass media campaigns informing about the state mechanisms for employment promotion of PwDs that envisage provision of financial and administrative support to employers who hire PwDs; **SUPPORT:** For overcoming the **internal, fixed minds sets of family members, mentors, and professionals supporters** of people with ID regarding their employment opportunities and abilities to adopt working skills: • Fieldwork with people with intellectual disabilities and their family members and support persons; • Development of targeted projects and applying for external funding for training and support of people who are living or working with people with ID; • Establishing and maintaining supportive social networks at a national level; • Development of methodology and best practices guide for supporting the work practice of professionals who are working with people with ID. **CONTROL and INFORM** For overcoming the **external** obstacles that hamper the employment of people with intellectual disabilities: • Lobbying in policymaking in the field of social protection and employment promotion of people with intellectual disabilities; • Organisation and participation of mass media campaigns explaining the need of people with ID to receive targeted and long-term support by the state institutions; • Organisation of information events, workshops, etc., dedicated to the promotion of the abilities and mechanisms for skills acquisition of people with intellectual disabilities.

5.5. RELATIONSHIP WITH INCLUSION INDICATORS

Personal conditions
Physical conditions of physical and psychological health
Economic conditions
Environmental conditions
Access to goods and services and public funding schemes
Legislative policy to promote inclusion
Employment conditions
Respect for difference
Access and adjustments in the workplace
Socially responsive employment
Economic remuneration

4.2. QUESTIONS FOR REFLECTION

o Summarise in few sentences the essence of the problem, which is tackled by the team of "Maria`s world" in the "I can work" case study.
o What is the main challenge?
o What causes the problem?
o Who is affected from the problem?

o How could the personalized individual support for the development of working skills improve the inclusion of people with disabilities onto the labour market? What are the benefits of personalised individual support? What can be done differently?

o Why is this an example of both mid-stream and up-stream social marketing?

o What social marketing methods were used by the team of Maria`s World to cope with prejudice of employers towards the work capabilities of people with intellectual disabilities?
o What was done in "I can work" project?
o What else can be done in the future?

o In this case study they chose to show the action they were promoting (show PwD working well to change a stereotype). Why is this more effective than providing written communication about the work abilities of PwD?

o Did they choose the best behaviors to change and focus on? Why or why not?

o Why is it so relevant to deeply understand your target audience?

o What are the main attributes of the socially responsive employment and how they were addressed in the "I can work" case study?
o Do you have other suggestions for promoting socially responsive employment?

o Please list up to 3 characteristics of social marketing included in this case-study and another 3 characteristics typical for disability sector.

oPlease, list up to 3 characteristics of social marketing included in this case-study and another 3 characteristics typical for disability sector.

CHAPTER 6. CASE 3: EMBRACING INCLUSION, EMPLOYABILITY AND AWARENESS: AWAKEN "CLOSED MINDS"

Title of the case study: MARKTH!NK. **AUTHOR:** APCC

6.1. SOCIAL MARKETING PROBLEM TO BE ANALYSED: Embracing inclusion, employability and awareness. Raising awareness of social responsibility, promoting equality and inclusion in the employment of those who stand in a weaker position in society.

6.2. AUDIENCE OF THE CASE: The target group were Employers of People with disabilities; Authorities, administrators and technical teams of the Organizations

6.3. LEARNINGS:
1. Create new conditions of employability, increasing the level of skills of people with disabilities.
2. To awaken "closed minds", focusing on employers and society in general, helping to open them up to the issue of disability in the Medium and Long Term.
3. Provides professionals working in the organizations some understanding of the potentialities of applying social marketing, either in their own organizations or in actions carried out by them for their target publics.

UPSTREAM	MIDSTREAM
Promoting forms of social marketing by mobilising different socio-economical actors, including companies, for the realistic integration of the most disadvantaged audiences into the normal labour market	Promoting personal marketing knowledge and improving skills and professional knowledge within an active citizenship frameworkD.

6.4. BENCHMARK FRAMEWORK FOR CASE STUDIES: MARKTH!NK

Contextualization	The Markth!nk project was developed in Portugal between 2000 and 2004, framed in a transnational partnership (S.A.M.E. Social Responsibility, Transnational Partnership Agreement for Equality), with the aim of raising awareness of social responsibility, promoting equality and inclusion in the employment of those who stand in a weaker position in society. It was developed in the geographical area of the districts of Coimbra and Aveiro, having as partners: NRC-APPC; Portuguese Rotary Foundation; Coimbra City Hall; Ferrand Bicker and Associates; KAMAE SI, Gandon Enterprises - IRL and Groningen Municipality - NL. The NRC-APPC ssuuthe control and coordination function of this project, functioning as a support entity in mutual adjustment. The Markth!nk Project assumed as mission to embrace inclusion, employability and awareness raising and had as main goals: -promote forms of social marketing by mobilising different socio-economical actors, including companies and general public for the realistic integration of the most disadvantaged audiences into the normal labour market; -promote personal marketing; improve skills and professional knowledge within an active citizenship framework. Markth!nk has emerged in the search for solutions/methods to address the country's difficulties and needs, including the increasing number of people with special needs, the increase in job demand by this social group and the weak supply of employment and the difficulty of employers in integrating it. The pre-work condition values of the disabled population indicated a low activity rate and a high unemployment rate compared to the population. While there has been a process of change related to these aspects, employment remains a sensitive issue for people with special needs. In this sense, Markth!nk has essentially strengthened the reapproachment between young people with disabilities and the labour market, facilitating importante content/training for these individuals and also access to new Technologies and employment. It also promoted moments of conviviality in order to sensitize employers and, in general, to talk about the problems that affect people with disabilities.

Results	The Markthink Project **developed between 2000 and 2004**, promote to waken minds of employers , enhanced knowledge and paradigm shift in the view of the personal, social and professional skills of people with disabilities. Employers have acquired social awareness resulting in a change in their business management. **The employability conditions changed significantly.** In 2003, the APCC had a rate of integration in the labor market of 48%. After applying the methodologies and products developed in the project, there was an 86.6% employability rate for people with disabilities im 2007. We also saw a 65% increase in partnerships with companies / organizations in the period mentioned above. The implementation of the project also enhanced the critical analysis of the support provided by the APCC to people with disabilities. The result of this reflection resulted in a paradigm shift with regard to the interaction of people with disabilities. We implemented a change in the analysis of results in relation to the success rate at the end of training courses. We started to analyze the results from the perspective of the global Quality of Life of people with disabilities in the social, physical and psychological dimensions. Thus, we stopped presenting results of professional integration fees and started to apply the Active Inclusion Fee terminology, analyzing the full participation in the society, including the maintenance of a job. **Nowadays the value of 88% referring to the Active Inclusion Rate,** transmits the collective effort of all those who cooperated for this result, both by the technical and monitoring team of the trainees, as well as by the framing entities and, essentially, by the trainees, being the integral and fundamental part that contributed to this result. Within the scope of the Markth!nk project, the following products resulted: 8 Products: Guide to good training practices for with disabilities: -"Markth!nk. Manual of the Personal Marketing Trainer: an instrument to support training actions oriented to this area of knowledge, containing innovative pedagogical methods, namely techniques of dramatic expression, brainstorming and autoscopy; - "Markth!nk. The Manual of Training in Personal Marketing": A strategic analysis oriented to the search for employment": manual that aims to guide in practice the individual with special needs in the management of the image and behavior at the professional level, guiding a more appropriate integration of this in the labor market, through the adoption and application of a set of techniques and marketing concepts applied to the individual; - "Markth!nk. Outdoor activities as a mean of developing skills in public with disabilities": presents outdoor activities as a Good Practice in the development of skills in people with disabilities and helps to organize this type of activities, describing the methodology developed/applied, as well as the main conclusions of this experience; - "Markth!nk - The Social Marketing Plan": aims to support the application of methodologies, processes and marketing strategies for the creation of conditions of employability of people with disabilities.

Results	- Manual of Social Marketing: Behavior Change, *Invertible* Trends: The Marketing Case: provides the first conceptual framework of Social Marketing in Portugal and outlines the framework of its application in the context of non-profit organizations; - Manual of Social Responsibility in Design, the Marketing Case: Describes the evolution of the logo, image and communication associated with the project, in an inclusive design logic; - This kit also integrates an interactive CD-Rom "Let's build your Curriculum Vitae" producing unique knowledge in the national context, standing out for the quantity, quality and variety of its products; - The inclusion of themes (Social Marketing and Social Responsibility) in the contents of three courses units of University and consequently inclusion of themes in practical work by students of an interdisciplinary nature (in 2004, about 233 works done); one master's thesis and one doctoral thesis was initiated inspired by the project.

Benchmarks (8 Social Marketing reference criteria)

Customer orientation	Knowing that people with disabilities are one of the groups that face more and greater barriers in access to various dimensions of social life, namely employment, the APCC was an interlocutor of the Markthink project, taking on the mission of promoting conditions for full inclusion of people with disabilities through the experimentation of innovative programs and methodologies of personal and social marketing. Five types of surveys were built using a questionnaire that aimed at exploring the needs of 5 publics established as target audiences for the marketing strategy: i) **People with disabilities with increased employability difficulties**;ii) **Employers**; iii) **Authorities**; iv) **Organizations** and professionals responsible for monitoring and support-ing the integration of people with disabilities and v) **the society in general**). The issues common to the five segments were related to the definition of disabled, the perception of the number of disabled people in Portugal and the responsibility for supporting disabled people. After this need analysis, the Markthink Project assumed as mission to embrace in-clusion, employability and awareness raising, and decided to focus on two main audiences: people with disabilities with employability difficulties, and employers/companies that were not part of the project's client portfolio.

Behavior	**Behaviour that needed to be adopted:**
	    o **Disabled person** - socio-professional inclusion - participation and empowerment;
	    o **Authorities** - Articulation with regulatory bodies to build social policies appropriate to the social and professional needs of people with disabilities;
	    o **Society** - Promotion of socially responsible territories - Joint work with social and community services - building networks with public and private organizations and services to create equal opportunities in the professional and social integration of people with disabilities
	    o **Employers** – Awareness / intervention in companies, institutions for the issue of disability (de-stigmatization) and accessibility to employment.

Theory	The development of the following two manuals were at the core of the project, helping in creating the activities needed to make people change their behaviour and reach the objectives. The first manual was: **SOCIAL MARKETING:CHANGING BEHAVIOURS AND REVERSING TRENDS THE MARKTH!NK WAY (1st. Book about social marketing in Portugal)** Based on: **Andreasen (2002)**, who developed a typology of behaviours in relation to change and regarding strategies and the kind of intervention that could lead to change (individual, community and social structure); **Peattie and Peattie (2003)**, who stated that competition in social marketing is seen as a battle of competing ideas that have to have a strong impact on three A factors: Adoption, Attract and Accept. In connection with how commercial and social marketing are applied, at the time, they hold that the future development of social marketing should rely on better understanding on the differences between the social and commercial contexts; **Bagozzi (1975)** and **Kotler (1988)**, who included the social relations in the domain of marketing exchanges, being influenced by the discussions arising at the time on extending the concept of marketing; **Varadarajan and Menon (1988)**, who in "Cause-related Marketing" defended as fundamental to pay special heed to the kind of social cause associated with it; in particular it must be consistent with the product image and characteristics being promoted, and consistent with the socio-demographic features of the firm's target public. The second manual was: **THE BOOK - OUTDOOR PURSUITS AS A WAY OF DEVELOPING SKILLS IN THE DISABLED POPULATION** The Range & Scope of Outdoor Education - **Loynes & Higgins 1997.**

	[The] 'outdoors' is perceived as a vehicle for learning as well as leisure (**cf. Cooper, 1998; Gair, 1997; Higgins and Humberstone 1998**), thus the outdoor sector provides, makes available or engages with outdoor adventure experiences for a variety of purposes including, education, youth and social work, management development, therapy, leisure and recreation. **OUTCOMES OF OUTDOOR EXPERIENCE** − improvement of self-esteem (**Gillet, Thomas, Skok and Mclaughlin 199); youth at risk (**Mc-Cormack 2003**); − **Hattie et al. (1997)** self esteem, academic , lead to interpersonal adventure benefits (specific outcomes: independence, assertiveness, and decision-making); − **Goldman and Priest (1991)** and **MacRae et al. (1993)**: increase in risk-taking behaviour transferred to work place; − **Allison (1998)**: many attitudes changed including environmental Issues during and through expeditionary type of experience; − **Hayllar's (1997)** research in outdoor management development suggests positive changes in business people which involved, team building, greater interpersonal trust, better judgement and supportiveness. The description that it gives of the use of outdoor pursuits to increase the employability of disabled people provide a new perspective on some important aspects of work, such as empowerment, the exercise of citizenship and the activation of the relation between the actors/agents and the area of social integration (**Lockood3,1964; Mouzelis,1995**). It starts from the presupposition that "social" living (i.e. living in relation to others) is only possible through the analysis of concrete situations.
Insight	**Based on the main problems/needs identified in the diagnostic phase** for implementation of the Markthink project, it is identified as behaviors to change: o Improve cooperation between state, employers and people with disabilities. This is necessary to communicate between the parties, as it is verified that the threeaxes present a different communication, limiting the inclusion of people with disabilities in the labour market; o Increase the involvement of employers in the process, addressing with them the advantages of being a common practice employing people with disabilities and thus combating the lack of involvement due to factors such as ignorance of state measures to this end; o Need for a greater knowledge of the position of people with disabilities in the labor market, focusing on the importance of conducting further studies specifically for the population with disabilities, and it was verified that existing studies are scarce and of extended and heterog groupsis nios, not allowing an effective knowledge of the position of people with disabilities in the labour market.

Exchange	In general, the costs and benefits associated with behavioral change are listed below:
	
	Cost
	People with disabilities
	     o Time spent on training;
	     o Psychological - Taking responsibility;
	     o Sensory - feeling of discomfort;
	     o Physical - May fall as a result of non-financial costs related to effort.
	Employers
	     o Financial - wages payable to new workers;
	     o Time-time undone in contacts;
	     o Psychological - responsibility to take on an employee with disabilities;
	     o Sensory - difficulty in understanding the disabled person;
	     o Physical – may fall as a result of previous non-financial costs.
	Benefits
	People with disabilities
	Based on the Maslow Pyramid, the Markthink project will affect people with disabilities in terms of esteem, satisfying the desire of these individuals to be accepted by others and by themselves. On the other hand, this project allows to satisfy the need for personal, social and professional achievement.
	Employers
	Based on the same scale of study when employing people with disabilities, the employer is able to meet the needs of esteem and stimulate the realization, through the acceptability of employers themselves and workers, customers and the general public; and the integration of people with disabilities makes employers strive and stimulate the feeling of self-compliance and social responsibility.
	The development of interventions always aims to bring maximum benefits and reduce costs, so we highlight some interventions and the analysis of their cost / benefit:
	- Creation of intermediate reflections to meet the needs of the segments, promotes the awareness of needs in a timely manner facilitating the resolution of potential problem situations (benefit), which reduces the risk of a bad adaptation of both parties (cost);
	- Use of innovative techniques and methodologies, such as brainstorming and outdoor learning, enhances an environment of equality between the parties with direct impact on the self-concept of the person with disabilities and employer's insight (benefit), minimizing situations of discomfort due to ignorance (cost);
	- Develop complementary services, promotes the empowerment of the person with disabilities, facilitating their path of responsibility profissional and supporting companies in the articulation with the worker (benefit), decreasing the feeling of uncertainty and insecurity in the performance offunctions (cost);

	- Develop skillsin people with disabilities, promote their self-confidence and self-determination, and reassure the employer with regard to the skills of the worker (benefit), to the detriment of the feeling of responsibility of "having to give" a job to the person with disabilities (cost); - Screening service with a view to insertion in companies taking into account the characteristics of each person with disabilities and the profiles required by the companies, increases the probability of success of the integration of the person with disabilities and the acceptance by the employer (benefit), reducing the admission of unprofiled workers to the employment offered (cost).
Competition	In our project, we identified internal competition, but we exclude external competitors, in fact, with regard to Inclusion policies, the APCC has developed since the beginning of its formative project (1989) the dimension of **integration into the normal employment market** of people with disabilities, contrary to the tendency of organizations in the same scope of promoting protected employment. Therefore, **there is no external competition.** Regarding **internal competition**, it should be noted the overcoming of the stereotypes concerning the personal, social and professional skills of people with disabilities, keeping up the focus of multidisciplinary teams that worked in a holistic area, seeking the involvement of Companies/ Organizations in the achievement of or common objective.
Segmentation	This study case has as focus not only on people with disabilities, but **is oriented to upstream**, namely the employers/companies. People with disabilities with employability difficulties The main segmentation criteria in the creation of employability conditions are: Demographic, geographical, institutional, sanitary, educational and psychological conditions. Based on the previous assumption, we decided to choose only 5 criteria, and the psychological criterion was to support others, because there is great difficulty in their measurement and quantification. The psychological criterion is based on the satisfaction of the last two needs of the Pyramid of Maslow: esteem and belonging. Thus, people living in the districts of Aveiro and Coimbra, **attended training courses** NRC / APPC, disabled, aged between 15 and 32 years and with the minimum of the 2nd cycle. Employers/Companies The main segmentation criteria related to job creation are: geographic, employers, companies and the psychological. Based on the previous assumption, we decided to choose only 3 criteria, and the psychological criterion was to support others, because there is great difficulty in their measurement and quantification. The psychological criterion was based on the satisfaction of the last two needs of the Pyramid of Maslow: esteem and belonging. Thus, it was considered a set of companies and employers that **managed their activities** in the geographical districts of Coimbra and Aveiro.

	For geographic segments, demographic and sanitary conditions, outdoor actions were proposed, including local and community programs to increase social inclusion and employability and their dissemination directed to each geographical area; for the institutional, educational and employers/companies segments, a manual of good practices was proposed and the study of an information system and dissemination of the needs of companies, pilot actions for the training of people with disabilities and tools of personal development, promoting personal marketing and facilitating the scepticism.

Methods mix	The methodology used by MARKTH! NK promoted the multiplier effect, using diversified methods:
	In the field of **Education:**
	- Update training methods and content for people with disabilities;
	Disability aims to increase knowledge and improve the personal and social competences of people with disabilities (behavior achieving real and lasting results and avoiding bad experiences in companies (competitors);
	- Seminars and workshops;
	- Outdoor activities - programs and activities that promote integration and team spirit, in order to give relational skills and promote the sharing of experiences of both groups (behaviour), facilitates the process of inclusion of people with disabilities in the labor market, normalizing their presence and valuing their importance (competitors).
	In the field of **Support**: provision of two services
	    o Training Service: professionals recruit people with disabilities, select them according to specific criteria (residence, age, education and training of the group), and then train them in accordance to the need of both trainees and employers, to prepare them to enter the labor market;
	    o The (re)Integration Service: this is the product of the training (disabled people with acquired skills) on the market. This service facilitate the placement of PwDs in the labour market.
	In the field of Information
	- Disseminate the concepts of disability and social responsibility;
	- Dissemination of business needs.
	
	In the Field of Control
	- Follow-up of people with disabilities after they have been inserted in companies, in order to try to determine the reasons for success / Failure, for future approaches;
	- Monitor feedback.
	
	In the Field of Design
	- Creation of appealing "brand" image, physical support indicator of quality evidence;
	- Elaborate a 'sales campaign' to promote and improve communications skills.

6.5. RELATIONSHIP WITH SOCIAL INCLUSION INDICATORS

Personal conditions
Economic conditions
Physical conditions of physical and psychological health
Environmental conditions
Availability of social networks/partnerships
Legislative policy to promote inclusion
Access to health and education systems in operation
Social participation
Interpersonal and affective relationships
Participation in civic activities/initiatives
Employment conditions
Respect for difference
Workplace accesses and adjustments
Long-term employment
Socially responsive employment
Access to unemployment insurance
Remuneração económica

6.6. QUESTIONS FOR REFLECTION

o **After 17 years of the completion of the Markthink project and taking into account the technological advances and emergence of other forms of communication, what new products could emerge to complement or replace those that resulted in 2004?**

o **One of the consequences of the project was the paradigm shift of the interaction that the APCC had with people with disabilities.**
o **What importance has this change in the Inclusion process?**

o **What can be improved or added in the future?**

o **Why is this classified as a social marketing intervention?**

o **Why is this both midstream and upstream social marketing?**

o **What insights gained about the target audiences were used to inform this project and change behaviors?**

o **What was the exchange for employers?**

o Why was it important to differentiate between internal and external competiton in this case study?

o How did they segment their audiences? Whould you do it differently? If so, how?

o Please list up to 3 characteristics of social marketing included in this case-study and another 3 characteristics typical for disability sector.

CHAPTER 7. CASE 4: DEVELOPING TOOLS FOR DECISION-MAKING BY MANAGERS OF SMES TO FACILITATE THE INTEGRATION

Title of the case study: Diversity management–Respons&Ability. **AUTHOR**: APPC

7.1. SOCIAL MARKETING PROBLEM TO BE ANALYSED: Promote the integration of people with disabilities (PwD) in the labor market, namely in Small and Medium Enterprises (SMEs) and the need to develop, test and communicate innovative human resource management policies and practices within the scope of social responsibility.

7.2. **AUDIENCE OF THE CASE:** The target groups were the SME administrators and human resources managers and the universities.

7.3. LEARNINGS:

1. Although the importance of increasing employability and the ability to compete for job opportunities in the labor market is clear, the Respons&Ability shows that labour market insertion strategies of this kind only address a part of the problem, and that a genuinely comprehensive approach is also needed to address the "DEMAND" side of the equation, e.g., the discrimination faced by individuals and groups who are effectively often at the bottom of the labour market "food chain" and the need to change the attitudes of employers.
2. A particular strength of Respons&Ability was that it developed and tested innovative methodologies and tools relating to both the "demand" and "supply" sides of the labour market (not only individuals PwD).
3. The importance of CSR in providing a framework for working with employers to support integration strategies. A concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis".

UPSTREAM	MIDSTREAM
This project aims to develop tools for decision-making by managers of SMEs to facilitate the integration of people with disabilities in their companies	

7.4. BENCHMARK FRAMEWORK FOR CASE STUDIES: RESPONS&ABILITY

Contextualization	Developed between 2004 and 2008, the Respons&Ability Project arose from the need for a group of 6 European countries (Portugal, Spain, Lithuania, Denmark, Italy and England), to integrate good practices in the area of social responsibility and diversity management, and to find a set of products that would facilitate the communication and awareness of the entities responsible for these areas. Each country faced the management of diversity with the group of people that found the most obstacles in accessing the labor market. Portugal was responsible for the Respons&ability – project Investing in Diversity Project (led by APCC). The difficulties encountered over the years in finding a place in the labor market for people with disabilities were the motto for the development of this project in APCC. We have felt the need to carry out work that allows us to overcome reservations and resistance on the part of companies / entrepreneurs in accepting and implementing employment contracts for people with disabilities. It becomes for us to develop and communicate models of social responsibility, to enterprises and their stakeholders, in order to achieve innovative practices of human re-sources development, in employment opportunities for disabled people. For us is crucial that they can understand the perception of disability today and collaborate to facilitate integration. Since the project aims to change company policies regarding diversity in the workforce, the target audience for the project were the SME administrators, human resources managers and the universities. In 2007, in Portugal, the percentage of active population of people with disabilities was 19.9% and of these, only 55.2% were employed. SMEs represented 99.5% of the Portuguese business enterprises. The main objective of the Respons&Ability project was to ensure that **companies and their professionals** can understand and ensure good practices of social responsibility and diversity management that promote and effect the employability of people with disabilities. In this sense, we proposed: • Sensitize the heads of SMEs about the principles and foundations of social responsibility and about diversity management; • Provide small and medium-sized companies with resources to integrate socially responsible organizational behaviors. To achieve these 2 global objectives, 4 specific objectives were defined: • Produce instruments for valuing and implementing social responsibility and diversity management;

	• Identify good Social Responsibility and diversity management practices in the strategy of national and international SMEs; • Deepen and systematize knowledge about Social responsibility within the scope of strategic integration processes of diversity in SMEs; • Develop skills in Social responsibility and diversity management.

Results	The Responsibility project ran between 2004 and 2008 and was able to bring the issue of integration of PwD(People with disabilities)into the SME market to the agenda, developing facilitating tools for managers and promoting reflection on these issues:
	1 - Three guides on the integration of people with disabilities (Marketing guide; communication guide and integration guide). The manuals, at the time, were available online at all sites of the partner entities. In hard copy they were distributed in the workshops carried out. Each event accepted a maximum of 40 people.
	2 –Tree workshops and two round tables were also held, which made it possible to reach around 140 participants, including companies, rehabilitation professionals, public bodies and academia.
	
	Promoted:
	    o Ensure the monitoring of the integration process, by specialized technicians, including the suitability of the facilities and processes for the integration of people with disabilities
	    o Develop ways to support business communication including good practices for integrating people with disabilities and ways of recognizing SMEs
	    o Deepen, gather and disseminate knowledge about SR, including the benchmarking strategy on successful and innovative cases regarding diversity management.
	Respons&ability dissemination actions had a notable territorial impact. Aveiro, Coimbra, Lisbon, Leiria, Braga, Matosinhos, Vale do Ave, Setúbal, S. Miguel and Funchal were the chosen places and covered a considerable number of stakeholders: Companies, Universities, Students, Rehabilitation and Human Resource Management Professionals. Also note worthy is the presence of the project in the transnational event "empowering a new future", Dublin - Ireland, promoted by the National Management Body.
	In terms of the communicational impact of the project, in a one to one interview, the spokespersons of the project presented the main results of the Respons& ability project to several newspapers, magazines, Radio and TV.
	It was decided to develop an important work in order to stimulate communication to raise the awareness of stakeholders, economic agents and companies, in view of the good practices for the professional integration of PwD, through television reports with testimonies of success (RTP1, TVI and SIC).
	    o Connection to the academy to develop training and skills, in the future managers and markteers, in areas of SR and organizational change.

Benchmarks (8 Social Marketing reference criteria)	

Customer orientation	Since the project aims to change company policies regarding diversity in the workforce, the target audience for the project were the SME administrators and human resources managers and the universities.
	A survey was built with the objective of identifying processes for the strategic integration of diversity, in order to be able to direct the project's action to companies who effectively made decisions regarding the hiring of people.
	The end result was a number of 63 companies that responded to the survey, of which only 31% had people with disabilities in their staff.
	The companies selected to continue the project were the ones that:
	Considered that in their company there was a diversity policy;
	    o Had experience of recruiting PwD;
	    o Understood the concept of social responsibility;
	    o Were open to being contacted for future actions within the scope of the project.
	Regarding the work with universities, the partnership defended the importance of teaching in the training of future professionals in the area of management and human resources. It was a bet on training in order to carry values to future generations.
	The ultimate goal was to change the attitude of decision-makers towards diversity and the integration of social responsibility values.

Behavior	Our focus was to change the attitude of decision makers towards diversity and the integration of social responsibility values in order to increase the number of people with disabilities with access to the labor market. That includes:
	    o Inclusion of the social responsibility and diversity theme in the organization's internal training and communications
	    o Integration of diversity management at the level of HR policies
	    o Improve the managers focus/commitment on integration of diversity management
	Organizational behavior indicators were, for example, ethics code preparation, selection and integration of people with disabilities.

Theory	The theory that served as the motto for the Project was that of the importance of diversity management framed in social responsibility theories. The practice of diversity management emerged in the United States in the mid-1990s as a form of strategic human resource management. In 1996, an article by Thomas Ely appears in the Harvard Business Review that addresses for the first time the management of diversity as we understand it and which served as a motto for the realization of the project. Ely Thomas, Harvard Business Review, 1996: "Greater diversity in the workforce will increase organizational efficiency. It will raise morale, give access to new market segments, and increase productivity. Although these benefits include profits, they go beyond financial measures: creativity, flexibility, organizational and individual growth, and a company's ability to adjust quickly and successfully to market changes". In 2005 Dickmannet et al. developed a theoretical model based on the relationship between organizational culture and tactics of organizational socialization. In this perspective, a diversity management to be effective, must imply a set of organizational elements that boost its benefits. What stands out in Respons&Ability is managing diversity from a global strategic perspective as a resource for creativity and innovation by creating inclusive organizations.

Insigh	After the application of the survey to 63 companies, a number of reasons have been identified why the promotion of diversity is not effective:
	
	    o Value only qualifications and skills in the recruitment process;
	    o Failure to recognize the advantages and impact of diversity policies on the company's strategy;
	    o Ignorance of what diversity is.
	
	Thus, there is an urgent need for information and awareness measures in the target audience so that attitudes can be changed.
	
	The first step in understanding cultural intelligence is understanding what culture is (values, attitudes, perceptions) and how its variation affects our behavior.
	
	It is argued that organizations have cultural intelligence, that is, they are prepared to adapt to diverse cultural contexts. This preparation goes through individuals, from top management to the operational level, however, in addition to individuals, the organization must have an organizational culture open to cultural diversity.

Exchange	It is undeniable that there are costs in adopting diversity management. According to the report "Methods and indicators to measure the cost-effectiveness of diversity policies in enterprises (2003), there are 3 types of costs that must be addressed:
	
	Economic costs:
	    o Creation and maintenance of a new human resources data system
	    o Training of employees and human resources technicians involved in recruitment
	    o Establishment and communication of new human resources policies
	    o Adequacy of jobs
	Opportunity costs:
	    o Requires commitment and time on the part of managers
	    o There may initially be some drop in productivity
	    o Increased management risks: traditional power and authority structures can sometimes be called into question.
	Regarding the benefits of adopting diversity management:
	    o Increase the company's reputation with customers and suppliers and with the community
	    o Access to new merchants and attraction of highly qualified employees
	    o Growth of innovation and creativity
	With the strategies used in the development of the project, we intend to improve the training of employees and human resources technicians involved in recruitment, and minimize the costs associated to commitment and time on the part of managers.

Competition	In our project, we identified both internal and external competitors. As the main internal competitor, we can consider the organizational climate that comes from the mental representation of the disability by the shareholders, employees and customers. We believe in diversity management from a global strategic perspective as a resource for creativity and innovation, creating inclusive organizations. So as for external competition, we can consider the competitiveness between companies in the same sector that the inclusion of diversity may imply.

Segmentation	Upstream
	     o SME administrators
	     o University responsible for course content
	     o Human resource managers
	Midstream
	     o Rehabilitation professionals
	     o Teachers and students from universities
	     o People with disabilities
	The target audience of the 3 guides and the books are certified SMEs, so the content strategy, language and specificity of the tools are adapted to these recipients. However, this does not exclude the application of other users, such as other companies, rehabilitation professionals, students, etc.
	The methodology used to select the companies involved in the project started by defining what was meant by SMEs and what type of benchmarking would be used.
	Regarding the definition of SMEs, the European recommendation was used, which establishes that SMEs have between 50-250 employees and a turnover of around € 50,000,000.
	As the universe of SMEs is very large, it was decided to work only with those with one or more ISO (International Organization for Standartization) certifications. The sector of activity was not considered significant.

Methods mix	**EDUCATE/INFORM**
	1 -Work with the universities to raise awareness of the inclusion of these issues in their study plans with:
	     o The inclusion of themes of Social Responsibility and practical work by students in three curricular units;
	     o Preparation of an ongoing master and doctoral thesis;
	     o Involvement of around 600 students, 4 teachers and school management;
	     o Elaboration of the code of ethics.
	The pilot training courses on social responsibility, within the scope of the MBA course, involved about 50 participants, at the level of the 3 modules provided and about 60 participants in each of the 3 workshops that were part of this training package;

EDUCATE/INFORM

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The pilot training courses on social responsibility, within the scope of the MBA course, involved about 50 participants, at the level of the 3 modules provided and about 60 participants in each of the 3 workshops that were part of this training package;

2 –Tree workshops for respons&ability tools dissemination. Target: companies, human resources mangers, rehabilitation professionals, academia and students, and two round tables to discuss about diversity management;

INFORM

Establishing partnerships with local and national support organizations;

Design of workshops taylor made with exercises to top managers and managers HR to think about diversity management / and integration of people with disabilities;

For the dissemination of products, the option was to hold workshops. We invite organizations with net works in the area of which facilitated the replication of products and continue to enhance the results of the project;

CONTROL

Monthly meeting of partnerships;

Progress reports and final project evaluation report;

DESIGN / EDUCATE

1 -Guides on the integration of people with disabilities:

Marketing Guide -allows you to quickly access a set of basic notions about social responsibility and socially responsible marketing;

Communication Guide - it is intended to be a practical tool through which SMEs will be able to self-assess their diversity management policy and assess the need to make reasonable adjustments to their way of communicating, in order to ensure that it is accessible to all without exception;

Integration Guide - it is proposed to inform SMEs about the concept of social responsibility as a strategy for the sustainability of the company; sensitize SMEs to the integration of people with disabilities; provide risk assessment and characterization tools that allow the company to carry out a self-diagnosis; provide the company with good practices to improve the weaknesses detected and provide additional information sources in order to improve its social responsibility practices;

2 -Diversity management book - the manual starts from conceptual considerations for the reality of SMEs in 6 European countries;

3 -Good Practice Guide - Responsibility for Change – The guide was designed to be a practical tool for practitioners engaged in related areas of work, as well as for stakeholders and policy makers involved in developing strategies and interventions, designed to promote social and economic inclusion;

We present the activities developed to reach each objective:
1 - Produce instruments for valuing and implementing social responsibility and diversity management
      o Marketing guide
      o Communication guide
      o Integration guide
o Diversity management book
2 –Identify good Social Responsibility and diversity management practices in the strategy of national and international SMEs
      o Diversity management book
      o Good practice guide
3 – Deepen and systematize knowledge about social responsibility within the scope of strategic integration processes of diversity in SMEs
      o Diversity management book
4 - Develop skills in Social responsibility and diversity management
      o Pilot training actions aimed at advanced business studies (MBA)

7.5. RELATIONSHIP WITH INCLUSION INDICATORS

The success of the project will ultimately aim to improve the quality of life of people with disabilities, in:

Personal conditions
Contributing to the improvement of psychological and economic aspects
Environmental conditions
Legislative policies to promote inclusion
Social participation
Interpersonal and affective relationships
Employment conditions
Respect for difference; socially responsible employment; economic remuneration.

7.6. QUESTIONS FOR REFLECTION

o **Summarise in few sentences the essence of the problem:**
o **What is the main challenge? What causes the problem?**
o **Who is affected from the problem?**

o **Why is this an upstream social marketing intervention?**

o **Why is it so relevant to deeply understand your target audience?**

o **What insights did they use and did they miss any insights that could make the project more effective?**

o **Is sensitizing people enough in order to create sustainable behavior change? Why / why not?**

o **This case used many methods in its mix of intervention strategies. Which do you think were the most "essential" to reach the aim and why do you think so?**

o **Why is this considered a social marketing intervention?**

o **Based on the knowledge about social marketing, which other solutions and proposals for improvement would you present?**

o **Please list up to 3 characteristics of social marketing included in this case-study and another 3 characteristics typical for disability sector.**

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ANNEXES

Tool 1: PROBLEM STATEMENT AND TARGET AUDIENCE SELECTION

To help you constructing the problem statement and selection of target audience

• Background: identify the social issue you want to address with your program, narrow down the behaviors and select the target audience.

1. Define the behavioral problem

E.g., return-to-work for disabled and chronically ill people

2. Social consequences (for the individual and/or the society)

E.g., unemployment, burden on families…

3. Health consequences (physical and/or psychological)

E.g., unhappiness, frustration, sense of uselessness…

4. Inequality consequences (in all the spheres of live of the people)

E.g., less income, worse quality of life, more dependence on others…

    • Narrow down the behavior(s) you want to address

E.g., employers' employment practices concerning disabled and chronically ill individuals

    • Target audience: who are the people you are going to target?

Which is the population involved?

E.g., employers

Which is the specific population that   ou have decided to involve in the program?

E.g., employers of the organization X in Coimbra that has x% of disabled employees
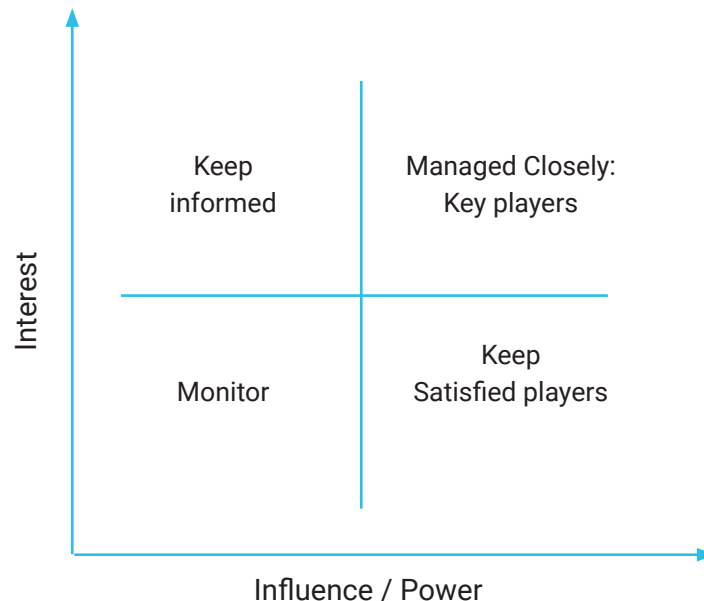
Tool 2: STAKEHOLDER MATRIX

To help you create the stakeholder matrix.

• First of all, create the stakeholder table, in which you list all the stakeholder, and you value and check their level of interest and whether they can have an impact on the activities;

Stakeholders	Interest of the activity	Likely impact	Communication with them
…	High/Low (specify which activity of interest)	+/-	Eg. meetings and personalized communication

Stakeholder influence is meant in terms of funding, legal processes, or support for your initiative, while stakeholder interest is how engaged the stakeholders is about the project outcome and whether the project will hurt (or not) their interests.

• **Then, create the stakeholder matrix.**

Tool 3: SWOT ANALYSIS

To help you conduct the SWOT analysis.

Internal Analysis	**Strengths** **What do you do well?** What unique resources can you draw on? What do others see as your strengths?	**Weaknesses** What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?
External Analysis	**Opportunities** What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?	**Threats** What threats could harm you? What is your competition doing? What threats do your weaknesses expose to you?

Tool 4: CO-DESIGN SOCIAL OFFERINGS

To provide you with a guide to effectively co-design the social offerings with your target audience.

Before start: use the theories that you have selected for the purpose of your programme to help you developing your questions. Example: if you have chosen the Quality of Life Model (Schalock et al. 2007), you should ask questions that explore the personal factors, the environmental factors, and how these lead to the perception of well-being.

Guide to conduct in-depth interviews and focus groups

In-depth interviews

In-depth interviews are a useful data collection technique to offer participants the opportunity to talk about what they think it is important, giving you very detailed answer per question. Using in-depth interviews, you can follow a semi-structured format: you can use an interview guide, usually including both closed-ended and open-ended questions, but in the course of the interview, you has a certain amount of room to adjust the sequence of questions to be asked and to add questions based on participant's responses (Zhang & Wildemuth, 2009).

Focus groups

The focus groups consist in a semi-structured group interview, generally formed by a small group of people (normally from 5 to 12) that have something in common (e.g. gender, age, experiences…), and it is particularly suited if you want to obtain several perspectives about the same topic, behavior or social practice (Gibbs, 1997). The benefits of focus groups include gaining insights into the ways in which individuals are influenced by others (Gibbs, 1997), however, they can be difficult to control and require trained and effective moderators to ensure the participation of all members of the group and that the discussion is led in a constructive way (Krueger, 2014).

Procedures

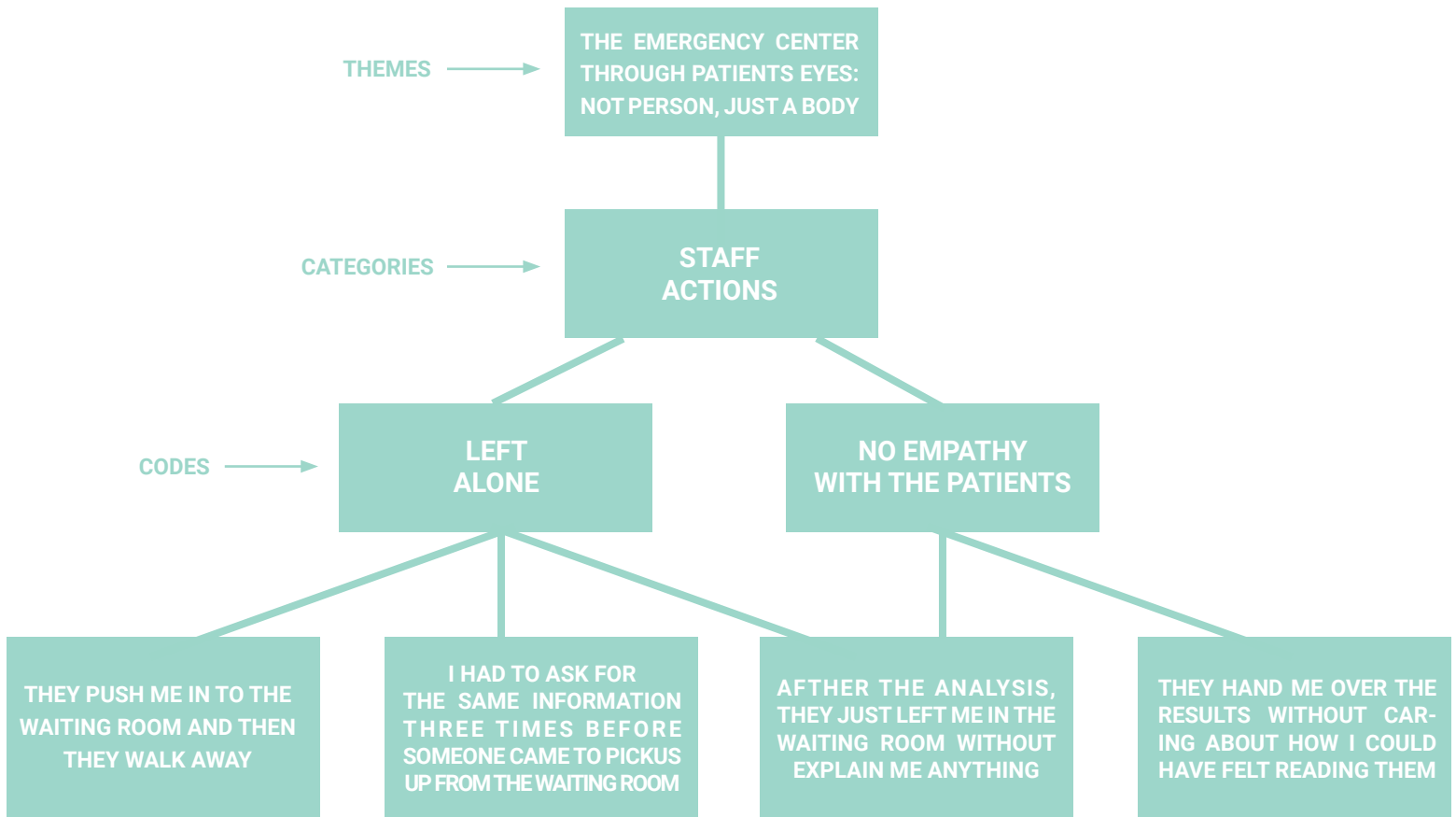| In-depth interviews	Focus groups
Think about the purpose of the interviews / focus group and the information you need to obtain	
Develop a set with open-ended questions (according to theory)	
Invite subjects at your session in advance and remind them about the event	
	Set up your working area organizing either a table or circle of chairs so that people can sit comfortably facing each other; you can also arrange a coffee or tea at the beginning of the encounter to ease the communications.
Open the session with thanks, introduce yourself and the purpose of the interview / focus group, reassure about confidentiality and an overview of the discussion topics; emphasize the social value of the research.	
Follow your interview guide in a free way: reorder the questions if it better suits the flow of the discussion and feel free to add questions that explore specific issues.	The moderator should work through his/her questions, facilitating the participation of all the group members.
	The co-moderator should take notes, highlight the key points and important themes to the discussion.
Always audiotape or videotape your interviews / focus groups (asking for permission). This can help capture observations made while writing down notes, and it is necessary for later transcription or translation.	
Thank people for their time and start the analysis of your findings. This should take place right after the focus groups while thoughts are still fresh.	

General suggestions to follow:

• Begin asking open-ended questions and use close-ended questions to narrow responses later to clarify and confirm points;
• Ask effective probing questions. Examples: "what does that mean to you", "help me understand", etc.
• Keep questions simple: think of the shortest, most direct way to ask a question;
• Consider providing examples after respondents have already given you their first input, otherwise the risk is that respondents may not think beyond the example;
• Ask positive questions before negative questions: this usually makes people feel more comfortable talking about the bad aspects;
• Spend more time listening than talking and avoid interrupting unless really necessary,
• Avoid asking leading questions and avoid introducing your own perspective.

Analyzing qualitative data

This is a general guide to analyse both in-depth interviews and focus groups.

1. Transcribe the data. Reading: analyze the transcription and re-read it in order to acquire a general meaning of what was expressed by the participants, making notations in the margin;

2. Organize the observations and first impressions into preliminary descriptive and interpretative codes based on the content and the frequency of a certain thought or statement; for example: if lots of participants express the idea that they were left alone in the waiting room of an hospital and then the staff walked away, you can simplify it into the code "left alone";

3. Conduct an examination of your codes to identify connections between them and create comprehensive categories. You will connect codes with similar content or context; following the previous example: if participants express other forms of carelessness from the staff, you can gather all this information under the category "Staff actions";

4. As final step, you can create a broader theme which constitutes more categories grouped together on the basis of the research question. This is useful to generate your own explanation of your data and drive your conclusions on the examined behaviors; Example: "The emergency center through patients' eyes: not a person, just a body".

```
THEMES  ──────▶  THE EMERGENCY CENTER
                 THROUGH PATIENTS EYES:
                 NOT PERSON, JUST A BODY

CATEGORIES  ──▶  STAFF
                 ACTIONS

CODES  ───────▶  LEFT              NO EMPATHY
                 ALONE             WITH THE PATIENTS

THEY PUSH ME IN TO THE    I HAD TO ASK FOR        AFTHER THE ANALYSIS,    THEY HAND ME OVER THE
WAITING ROOM AND THEN     THE SAME INFORMATION    THEY JUST LEFT ME IN THE   RESULTS WITHOUT CAR-
THEY WALK AWAY            THREE TIMES BEFORE      WAITING ROOM WITHOUT    ING ABOUT HOW I COULD
                         SOMEONE CAME TO PICKUS   EXPLAIN ME ANYTHING     HAVE FELT READING THEM
                         UP FROM THE WAITING ROOM
```

Surveys

The last method suggested are the surveys. Surveys can be structured as open-ended questions that lets the respondent express their thoughts on the matter (Bryman, 2012) or in the form of questionnaires. Questionnaires are formed by predetermined and structured set of closed questions that is given to a sample of participants. The use of questionnaires to measure characteristics of the population seeks to provide answers to questions as "How many people feel a certain way?" and "How often do they do a certain behavior?" (Sukamolson, 2007). You can present survey in a physical form (paper-based), administer them face-to-face or send them by email, over the telephone or online.

Tool 5: AUDIENCE PERSONA

To help you create your Audience Persona.

The Persona: example

Name: (give him/her a name to make it more personal)
Age range: adult (35-65)
Sex: both
Nationality: Spanish
City: Barcelona
Occupation: non-relevant
Other info-bio: acquired disability
Places often frequented: center x rehabilitation

Life goal: conduct as much as possible a normal life

Current behavior: inactivity

Behavior: continue to do physical activity and stay healthy

Psychological and personal characteristics:

Motivators in adopting the behavior

- Like sports;
- Practicing sport before injury;
- Benefits of spo ts;
....
....
....

Barriers in adopting the behavior

- Injury impedes the regular activity;
- Mental and physical effort;
- Embarrassment;
...

Based on your research question and your topic, you can add demographic information (marital status, family…) or other information (media consumption, potential influencers, trusted people…) as you consider it relevant. The important thing is that you create your audience persona with your results and data collected, generating a coherent "archetype".

Tool 6: SMART Objectives

To help you set SMART objectives

- Goal: based on the social problem, general statements of what you want to achieve;
- Objectives: Precise statements that list the tasks necessary to reach the goal.

Goal statement

Eg improve the social worker competencies and build effective initiatives for disabled people

Objectives statement/s

Eg by the end of the training (18/06/2021), the practitioners of the SIM project will be able to use social marketing practice in their associations for the 65% of their initiatives

Checklist to verify that your statement is SMART. If you tick "NO" on one item, try to rephrase it!

OBJECTIVES	YES	NO
Specific: be clear and don't leave room to interpretations when you think on what to do.		
Measurable: make an estimation about observable and measurable changes you want to achieve.		
Attainable: think about what resources you have to achieve your objectives.		
Relevant: Consistent, reasonable, result-based.		
Time-bound: define a realistic time-frame for your actions.		

Tool 7: Logic Framework

To help you create the logic framework for your evaluation plan.

In this table is presented another dimension, the "assumptions". These are all the influential factors (both internal and external) that, if not present, can negatively affect your project. Often these factors are not under your control, therefore, you should carefully consider how probable it is to meet these assumptions. In fact, if it is very probable that you don't meet an assumption, and this assumption is fundamental to proceed and successfully reach your objectives, you could consider either change the activities or the project objectives. Another added aspect of this table are the red arrows: this is the zig-zag logic. You should start from the assumption and follow this logic: "If the assumption X is met, then I will realize the activity Y; if the assumption J is met, the activity will produce the result/s Z…".

The example below, is an example related to SIM:

| Objectives	Indicators	Data collection	Assumptions
Impact: What will be achieved	Markers of accomplishment, or progress	How you want to collect the data	Underlying beliefs and influential factors that can affect the programme
Improvement of the interventions targeting disabled people with the use of Social Marketing techniques	Quality of services / initiatives provided	-Focus groups with social workers and disabled people -Results' collection from future initiatives	N/A
Outcome: Changes that the activities will create			
Practitioners will be able to use Social Marketing for at least 65% of their initiatives	Self-reported behavior on application of social marketing methodologies	Interviews or surveys with/for social workers	The training will be useful and improve the skills and capabilities of practitioners (maybe the training is bad, or maybe it is too difficult to be understood, or too theoretical…)
...			
Outputs: What the activities will produce			
19 practitioners with no knowledge of social marketing complete the Social Marketing training	-Attendance records (eg > 80%) -Satisfaction rate -Skill acquisitions: grades	-Register the presences -Satisfaction survey for practitioners -Do exams to register grades	Eventually practitioners will really participate at the training week (some could be absent because of pandemic, internet connection, not interested anymore…)
...			
Activities or strategies adopted to reach the goal			
Training week for 19 social practitioners who need to learn Social Marketing	Student participation (eg > 80%)	Check the participation rate on registers or check the attendance with a sign form	Practitioners want to participate at the training and learn about Social Marketing
...			I have social practitioners who could participate in a Social Marketing training

Process quality: make sure that any activities included in the intervention are responding to one or more of the SMART objectives!

Tool 8: **Exchange proposition**

To help you generate your exchange proposition.

Tool 4 have helped you in analyzing what are the motivators for the desired outcome (what are the drives and values of your target audience) and what are the barriers in adopting the desired behavior. Keep them in mind when designing your exchange offer to make sure that it complies with them.

Exchange
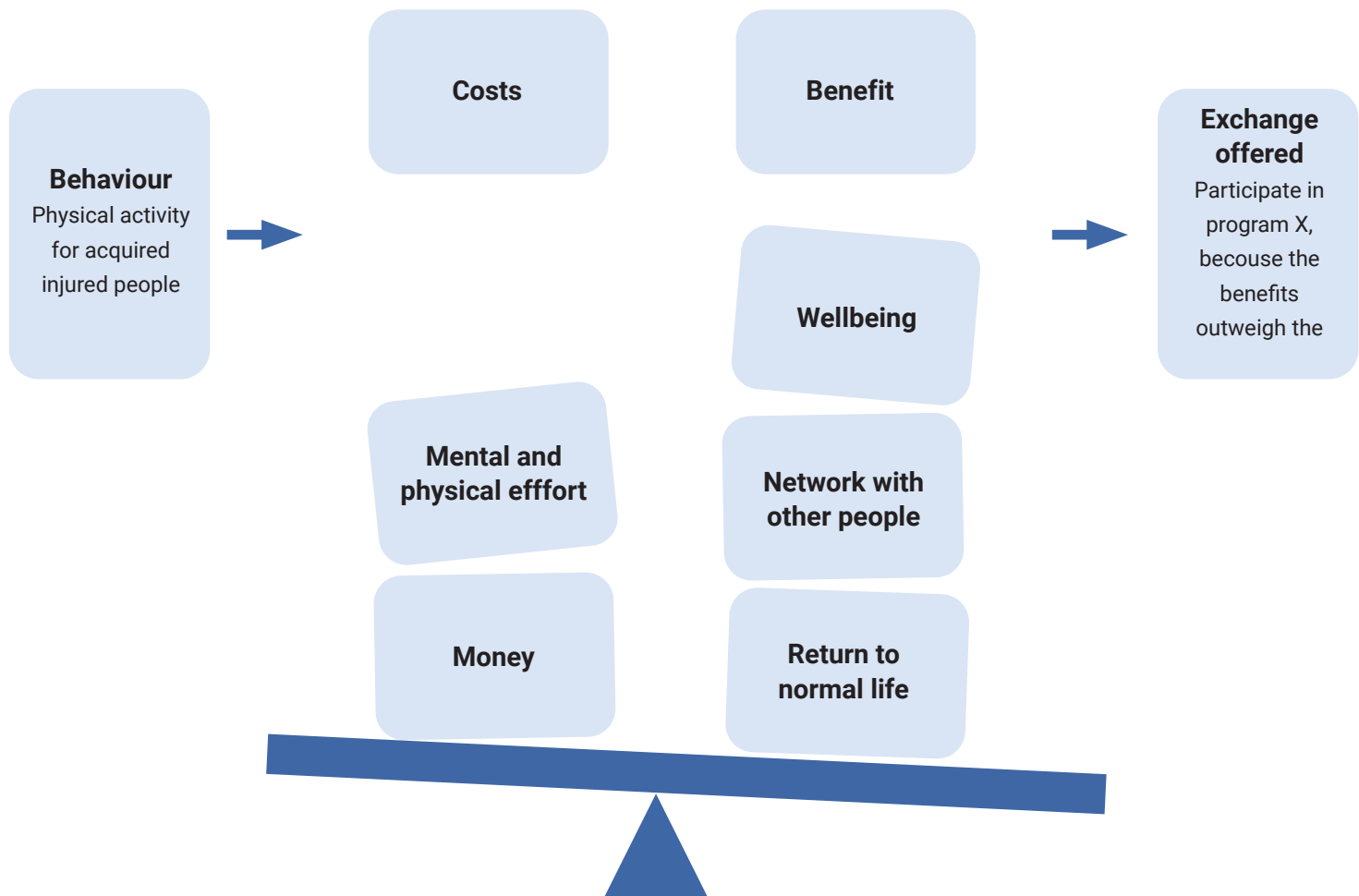
Remember that you need to provide value, indeed it is not a numerical calculation, but a co-creation of solutions based on target audience needs and allocation of value.

Tool 9: Marketing Mix

To help you create your marketing mix.

9.1 Product template

Core product (the benefits promised)

**Eg wellbeing and progressive return to normal life**

Actual product / service (the product or service you will develop to deliver the core product benefits)

Eg reinsert injured people into sport

Augmented product / service (the features that encourage and support uptake of the actual product)

Eg promotion of the sportive programme X

9.2 How to create an effective message design: the five Ws
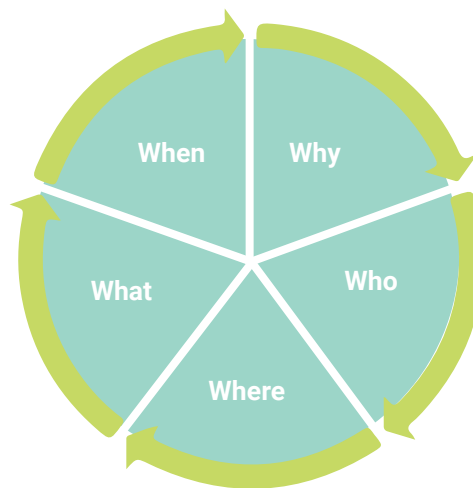
When you are developing your message, follow these five questions:

• Why are you communicating? Is it to inform, invoke action, change behavior / social norms?
• Who do you need to communicate with? Think about the formative research previously conducted on your target audience.
• Where will you reach the target of your communication? You need to select in which channels you want to promote your messages. You can promote them on traditional media (radio, tv, posters or flyers…), new media (websites, social media…) and/or it can be a physical promotional event, etc… Keep in mind the characteristic of your target audience when you decide your channel/s (eg if you want to use new technologies, make sure that your target audience use/is able to use them).
• What strategies will you use to communicate? This is the translation of the content of your messages into specific communications: think about emotional elements (you can elicit positive or negative feeling about behaviour), pro-social elements (we are in this together), it takes us all), moral elements (right or bad thing to do), non-verbal elements (eg visual cues), the tone… The general suggestions of the National Social Marketing Center are to keep the messages simple and clear, action oriented, relevant (focused on audience benefits), motivational, personal, concrete and easy to remember.
• When will you communicate to whom? Right communication at the right time: define when your dissemination will start and finish, how many messages to deliver and how often.

9.3 Record the initial mix of interventions that you want to use

Write down your intervention ideas:

Eg. of three combined interventions: a training for health care providers + policy changing of the institute X + design changing in the institute to make more intuitive and easier the development of the activity Y

Now record and select which intervention mix you have chosen, and why it is the case:

Interventions types	Selected	Why
Support		
Educate	X	Training of health care professionals
Inform		
Design	X	Change of the physical environment of the institution X
Control	X	Policy promotion for the institution X

Tool 10: Implementation plan

To help you organize your implementation plan.

Process Schedule

Activity	Activity Description	Who is Responsible	Start Date	End Date
Target Audience Analysis	Focus group with health educators and disabled people of organization X	Employee X and Y	gg.mm.aa	gg.mm.aa
...				
...				

Simple example of graphical representation of Gannt Chart in Excel

You can freely decide the level of complexity of your Gannt Chart. If you want to divide it by months, or weeks, or even days of work.

• Implementation recommendations for your implementation strategy:

    - Break down your activities into small actions;
    - Every action needs to be tied to a deadline and to someone responsible for meeting that deadline;
    - Think about the necessary budget for each action;
    - Communicate each team member his/her responsibilities to make sure everyone is on the same page;
    - Monitor your activities throughout the implementation and make changes and adjustments where needed;
    - Share lessons and decisions with the team.
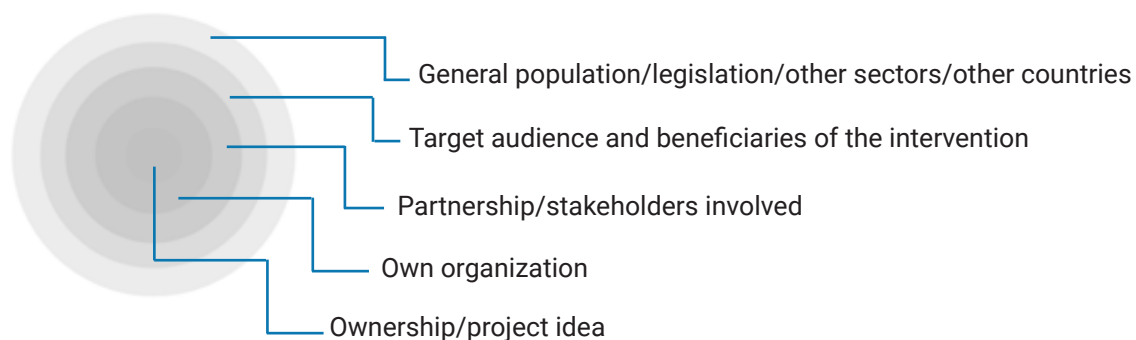
Tool 11: Evaluating outcomes

To help you organize your implementation plan.

Outcomes	Indicators	Progress	Score of achievements	Comments / Recommendations
Insert outcomes from the logframe	Insert indicators of achievement from the logframe for each outcome	Report against each indicator	Score from 1-to-5 or achieved yes or no	Provide any comments; explain if progress or results are not as planned; recommend future actions
Short-term outcomes				
Mid-term outcomes				
Long-term outcomes				

Tool 12: Dissemination strategy

To help you organize your dissemination strategy.

Consider the whole scenario of people involved:

General population/legislation/other sectors/other countries

Target audience and beneficiaries of the intervention

Partnership/stakeholders involved

Own organization

Ownership/project idea

• Dissemination table example

To whom	What	How to do it	When	Resources
General Public	Project Website	All partnership's languages; Related projects' materials/news; Downloadable documents; Recommendations; Links to other websites (partners, networks, etc.)…	Starting from Month X during the program implementation	(Amount foreseen)
Policy outreach/ Legislators	Meeting	Scheduling a legislative visits; Preparing a presentation…	Day X after the measurement of the project's impact	Project manager/ executive board members
…				

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