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

DATE: February 28, 2019
Agenda

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

• Kathryn Peck
  Associate Director, Strategic Communications

• Megan Pugmire
  Creative Director, Strategic Communications

• David Holmgren, M.S.
  IRB Manager

• Jacob Lindsley
  Study Coordinator, Layton Aging & Alzheimer’s Disease Center
OHSU social media and brand
Tools for recruitment
OHSU social media: we exist!

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

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

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

Whether you’re a regular OHSUian looking for info on how to use social media appropriately, or a communicator who needs help setting up and populating an approved OHSU social media account, this page has your answers.

- Guidelines for using social media
- Requesting a social media account
- Guidelines for managing an OHSU social media account

Guidelines for personal and professional social media use

OHSU is committed to using social media to build durable, authentic online relationships. These guidelines help community members achieve that goal and comply with OHSU policies.

As a member of the OHSU community (see the definition of ‘member’ in point 2 of this policy), your engagement with online conversations related to the institution should be thoughtful and transparent. The guidelines below ensure the privacy of OHSU community members, patients and the institution at large are respected.

1. Follow the OHSU Code of Conduct, HIPAA, Marketing and Promotion Policy and Visual Identity Guidelines. All policies apply in the online sphere. Do not offer medical advice on these platforms.

2. Be transparent, honest and respectful. When discussing OHSU or its competitors always disclose your affiliation to OHSU. Be sure to note that your views are your own. Ex: “Opinions shared here are my own and not those of my employer.”

3. Be mindful of privacy settings on all social media presences. Take care to learn who has access to your online postings. Review privacy settings regularly.

4. Avoid inflammatory or inappropriate discussions about OHSU or its competitors. If you feel these discussions need an OHSU response, please notify the Social Media Manager.

5. Maintain the confidentiality of internal information. Do not publicly post or share information posted on the internet.

6. Any engagement with news media about OHSU should occur through Strategic Communications. If a member of the news media approaches you through your social media account, please refer him or her to Strategic Communications at 503 494-8231.

If you have questions about any of these guidelines, please contact the Social Media
Are you, or a senior you know, looking for more opportunities to connect with others? A healthy social life can have a positive impact on memory.

Find out how to join this video chat study.

Trust the cataract experts at Casey Eye Institute to help you see clearly again.

Our surgeons are with you for every step.

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

Study on Mom & Baby Well-Being seeking participants.

OHSU researchers are conducting a study that looks at how maternal diet and metabolic state during pregnancy might impact the brain development and behavior of their children.

Research project involving new moms and babies seeking participants.
OHSU brand strategy

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

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

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

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

A strong brand can:

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

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

Branding resources

- Visual Identity Guidelines
- Logos
- Templates
- Photos
- Messaging
- Typography
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Proprietary and confidential. May not be distributed without administrative approval.
Templates

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

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

**Brochures**

Available through the Brand Portal.

View a sample 3-panel brochure or sample 4-panel brochure.

Need additional help? Visit the Brand Portal page or view the Brand Portal instructions.

**Email signature**

**Fax and memo sheets**

**Flyers**

**Letterhead**

**Posters**

**PowerPoint**

**Rack cards**
Marketing, Design and Advertising

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

What do you need to get done?

I'm interested in graphic design assistance

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

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

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

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

Requestor *

Megan Pugmire

Phone

Department

CS. Marketing

Needed by *

What do you want help with? *

Please select a value...

Describe your project

Budget *

Please select a value...
<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Info</th>
<th>Rates</th>
<th>Strengths</th>
<th>Bio</th>
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</thead>
<tbody>
<tr>
<td>Charlotte Woodward</td>
<td><a href="mailto:cwdesign@hsvenset.com">cwdesign@hsvenset.com</a>, 503-644-4999, [Website]</td>
<td>$75/hr</td>
<td>Complex charts and reports, Infographics, Multi-page layouts, Tempered production, Photo-shoot art direction, Patient education materials</td>
<td>Hi there, I'm Charlotte. I have extensive experience in graphic design and a passion for all things printed. Design is fun and I enjoy each new project. My creative designs are informed by years of work for health care, educational and other nonprofit organizations. Feel free to take a look at my portfolio and don't hesitate to contact me if you think I can be of service to you.</td>
</tr>
<tr>
<td>Dean Donohoe</td>
<td><a href="mailto:prdean@gmail.com">prdean@gmail.com</a>, 541-513-0443, [Website]</td>
<td>Graphic designer: $150/hr, Production designer: $100/hr, Art director: $150/hr, Production manager: $75/hr, Project manager: $75/hr</td>
<td>Multi-page layouts, Photo-shoot art direction, Environmental graphics, Vector-based illustration, Traditional illustration, Vector icon creation</td>
<td>Deo Donohoe is a creative studio. We've built digital publications, visual identities, commercials, print pieces, websites, music videos, interior spaces and many other things. We partner with cultural institutions, nonprofits, artists and companies to make unique, elegant and unexpected work. We go deep on everything, so we only do work we believe in. We're Tessa Donohoe, a designer, illustrator and painter, and Peter Dean, a writer, composer and car lover.</td>
</tr>
<tr>
<td>Deo Agency</td>
<td><a href="mailto:jkf@deoagency.com">jkf@deoagency.com</a>, 503-294-5449, [Website]</td>
<td>Graphic designer: $120/hr, Production designer: $200/hr, Art director: $150/hr, Production manager: $120/hr, Project manager: $120/hr</td>
<td>Or flat per project rate</td>
<td>Deo Agency is unlike in that we are a team of seasoned marketing communications professionals who will roll up our sleeves to work alongside partners and clients. We begin in 2009 in service to Portland brands. From the start, Deo Agency has focused on brand and campaign development work in health care. We speak to health care’s numerous audiences, including physicians and hospital networks, individuals who need guidance, access to education, and employer groups marketing for health insurance and health-outcome related services.</td>
</tr>
<tr>
<td>Todd Skiles</td>
<td><a href="mailto:todd@fullblastradio.com">todd@fullblastradio.com</a>, 503-227-2002, [Website]</td>
<td>Graphic designer: $90/hr, Production designer: $75/hr, Art director: $90/hr, Production manager: $75/hr, Project manager: $75/hr</td>
<td>Or per project flat rate</td>
<td>Down-to-earth Colorado boy. Worked in the music industry in Manhattan, fell for Portland. Learning about Health Literacy left me truly inspired. I’ve experienced the need while caring for my parents. It’s any project: [online form, patient handout] into a critical piece. Design with purpose: - I listen, ask questions and deliver options with a clear, concise message - You thoroughly review the winner - I get results [over 100 referrals from one client] Together we connect, engage and inspire our audience to donate, share [like], or understand a form and fill it out. catalytic right.</td>
</tr>
<tr>
<td>Sally Hoppner Design</td>
<td><a href="mailto:hoppnert3@comcast.net">hoppnert3@comcast.net</a>, 503-789-9618, [Website]</td>
<td>$90/hr or per project flat rate</td>
<td>Complex charts and reports, Multi-page layouts, Tempered production, Patient education materials</td>
<td>Sally Hoppner Design is a creative studio founded on a passion for engaging your audience to your brand. We help our clients raise awareness, expand their reach, inform and engage through new and innovative approaches. For 22 years, we’ve collaborated with organizations to conduct research, develop brand campaigns, launch campaigns and design collateral for various audiences such as health advocates, consumers, prospective students and more. Our small and mighty team is comprised of strategists, designers and project managers who feel that through true collaboration and respect we can create authentic, impactful design solutions.</td>
</tr>
<tr>
<td>Hub Collective</td>
<td><a href="mailto:jen@hublist.com">jen@hublist.com</a>, 503-222-0165, [Website]</td>
<td>Graphic designer: $125/hr, Production designer: $95/hr, Art director: $130/hr, Production manager: $15/hr, Project manager: $125/hr</td>
<td>Copywriter, brand strategist: $135/hr, Or per project flat rate</td>
<td>Hub Collective is a design studio funded by a passion for engaging your audience to your brand. We help our clients raise awareness, expand their reach, inform and engage through new and innovative approaches. For 22 years, we’ve collaborated with organizations to conduct research, develop brand campaigns, launch campaigns and design collateral for various audiences such as health advocates, consumers, prospective students and more. Our small and mighty team is comprised of strategists, designers and project managers who feel that through true collaboration and respect we can create authentic, impactful design solutions.</td>
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Thank You
Social Media in Clinical Research: IRB Considerations

David Holmgren, MS
IRB Manager
Pathways to Approval

Draft Materials
- OHSU approved templates
- IRB Advertising standards

IRB Approval
- Not unduly influential
- Doesn’t imply ‘treatment’
- Balance of risks/burden and benefits
- Does not promise free medical care

Strategic Communication Approval

IRB Approval of Strategic Communication Revisions
- Always Required!

Strategic Communication Approval of IRB Revisions
- (if needed)
ANY additional revisions will need IRB re-approval via a Modification
Does IRB review change when Social Media is used in research?

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

• The IRB ensures human subjects protection are in place. The IRB reviews advertisements and recruitment material for such things as...
  — Undue influence? For example:
    • Inappropriate focus on payment
    • Stating treatment vs. research
    • Promising/implying benefits beyond approved protocol
    • Conveying safety or effectiveness
      (since that is being studied in the research)
  — Accuracy (and not misleading)
  — Privacy and Confidentiality

• Essentially, the IRB conducts its review of social media-based protocol activities similar to more traditional methods.
When using social media in research studies, your IRB protocol must have a thorough plan addressing...

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

• Study-specific information only - limited to basic trial information such as title, purpose of study and study locations (i.e., Clinicaltrials.gov)

• Newsletters or articles already publicly available

• 3rd party postings not under researchers control
  — However, researchers must be aware of, and monitor anything posted on study-specific locations

• Communications between health professionals (such as MD to MD letters)

• May be other examples...

When in doubt, contact the IRB for guidance!
What **DOES** IRB need to review?
Some examples (not all inclusive)...

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

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

THANK YOU!

David Holmgren
IRB Manager
Email: holmgred@ohsu.edu
Social Media Recruitment Experiences

Jacob Lindsley

Layton Aging & Alzheimer’s Disease Center
I-CONECT Clinical Trial

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

- Opt-Out Mailing
  - Rec. Phone Call
- Opt-In Mailing
- Website
  - Call In
- Phone Screening
- Home Screening
I-CONECT Ads

Oregon Health & Science University (OHSU)
Sponsored · 🌠

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

Find out how to join this video-chat study.

OHSU.EDU

Find out how to join this video-chat study.

OHSU.EDU
I-CONECT Ads

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

- 22,353 people reached
- 641 people have clicked on the ads (3%)
  - $.31 cost per click
- 111 Engagements

- Of those who have clicked on the ads, 95% have been women
  - Of that group, 60% have been women over the age of 65
Wrap Up & Announcements
Announcements

Newest Recruitment Toolkit Documents are Available Online!

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

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

Don’t receive CRU News, email OHSUCRU@ohsu.edu to be added to the listserv.

For more information on OCTRI Recruitment Services, additional resources, or to request a recruitment consultation, please email octrirekrruitment@ohsu.edu or visit our website at https://www.ohsu.edu/octri
Additional Resources

OHSU Social Media & Marketing
https://o2.ohsu.edu/communications/channels/social-media.cfm
Email: socialmedia@ohsu.edu and branding@ohsu.edu

OHSU IRB
https://o2.ohsu.edu/integrity-department/research/human-subjects/index.cfm
Email: irb@ohsu.edu

National Institute of Health (NIH)

Recruitment Innovation Center (RIC)
https://trialinnovationnetwork.org/recruitment-innovation-center/
Thank You