

Welcome! The Webinar will Begin Shortly

Technical Assistance FAQs

1. Why can't I hear anything?

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 - Enter Access code: **663 767 753**
 - Enter Unique Attendee ID#: This can be found under the “Event Info” tab on WebEx screen
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2. Can I get the slides/materials for today's webinar?

- Download this presentation from: <https://soarworks.prainc.com/article/webinar-marketing>
- Or, at top left of this screen, click File: Save: Document

3. Will this webinar be recorded?

- YES, this webinar is being recorded and will be available at the above link within 1 week of this presentation.

4. Who can I call for technical assistance?

- Contact Lisa Guerin at lguerin@prainc.com or 518-439-74155 x5242 if you experience technical difficulties.



Proven Marketing Strategies for SOAR Sustainability

PRESENTED BY:

SAMHSA SOAR TECHNICAL ASSISTANCE CENTER
POLICY RESEARCH ASSOCIATES, INC.

UNDER CONTRACT TO:

SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

Disclaimer

- This training is supported by the Substance Abuse and Mental Health Services Administration (SAMHSA) and the U.S. Department of Health and Human Services (DHHS)
- The contents of this presentation do not necessarily reflect the views or policies of SAMHSA or DHHS.
- The training should not be considered substitutes for individualized care and treatment decisions.

Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Evaluation
- Question instructions

Learning Objectives

- Learn about effective marketing tools from the SAMHSA SOAR TA Center to help you share stories of your SOAR successes
- Understand why marketing your SOAR program is essential to sustainability
- Learn how to build your own graphics with FREE tools!
- Understand how Maryland successfully uses various strategies to market and sustain their SOAR initiative at the state and local levels

Agenda

Share the Success of Your SOAR Program Using SOAR Tools

- Holley Davis, Communications Specialist, Policy Research Associates, Inc., Delmar, New York

Funding Toolkit for Sustainability

- Matt Canuteson, MA, Project Associate, SAMHSA SOAR TA Center, Policy Research Associates, Inc., Delmar, New York

Growing and Sustaining SOAR in your State and Community

- Caroline Bolas, MSW, MS, Maryland SOAR State Lead, Maryland Department of Health, Behavioral Health Administration, Baltimore, Maryland
- Rich Schiffauer, BS, Adult Services Program Manager, SOAR Local Lead, Montgomery County Health and Human Services, Local Behavioral Health Authority, Rockville, Maryland

Questions & Answers

- Facilitated by SAMHSA SOAR TA Center Staff



Share the Success of Your SOAR Program Using SOAR Tools

HOLLEY DAVIS
COMMUNICATIONS SPECIALIST
POLICY RESEARCH ASSOCIATES, INC.

Talking Points

- Understanding the need for a marketing strategy
- Accessing tools from the SOAR TA Center
- Using free and low-cost tools to build graphics and websites
- Diving into social media
- Delivering powerful presentations

A photograph of several people's hands clasped together in a huddle, symbolizing teamwork and collaboration. The hands are of various skin tones and are wearing different accessories like bracelets and watches. In the foreground, there is a desk with a water bottle with a black and white striped sleeve, a glass jar filled with nuts, and a pen holder with several pens and markers.

Reputation | Trust | Influence

Marketing Your SOAR Program is Essential for Program Sustainability

Together We Create!

TOOLS FROM THE
SAMHSA SOAR TA CENTER

Build Your Marketing Toolkit with Ready-made SOAR Resources

SSI/SSDI OUTREACH, ACCESS, AND RECOVERY: AN OVERVIEW



THE ISSUE

Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) are disability income benefits administered by the Social Security Administration (SSA) that also provide Medicaid and/or Medicare health insurance to eligible individuals. The application process for SSI/SSDI is complicated and difficult to navigate. Nationally, about 28 percent of individuals who apply for these benefits are approved on initial application and appeals take an average of 1 year to complete.

For people who are experiencing or at-risk of homelessness or who are returning to the community from institutions (jails, prisons, or hospitals), access to these programs can be extremely challenging. Approval on initial application for people who experiencing or at-risk of homelessness and who have no one to assist them is about **10-15 percent**. For those who have a mental illness, substance use issues, or co-occurring disorders that impair cognition, the application process is even more difficult – yet accessing these benefits is often a critical first step in recovery.

A SOLUTION

The Substance Abuse and Mental Health Services Administration (SAMHSA) developed the SSI/SSDI Outreach, Access, and Recovery (SOAR) model to address this critical need. SOAR-trained case managers submit complete and quality applications that are approved quickly. The SOAR TA Center provides a three-step approach to SOAR implementation:

STRATEGIC PLANNING

Strategic planning meetings bring key state/local stakeholders (e.g., SSA and Disability Determination Services (DDS); State Mental Health Agency and Department of Corrections leadership; and community homeless, health, and behavioral health providers) together to **collaborate and agree** upon a SOAR process for the submission and processing of SSI/SSDI applications and **develop** an action plan to implement their SOAR program.

TRAINING LEADERS

Training of case managers using the **SOAR Online Course**. This free, web-based course includes the development of a practice case using a fictional applicant. A **Leadership Academy** program creates strong local leaders to support SOAR-trained case managers and coordinate local SOAR programs.

TECHNICAL ASSISTANCE

Individualized technical assistance for supporting **action plan implementation**, identifying funding opportunities for **sustainability**, developing **quality review** procedures, and assisting with **tracking outcomes** to document success and identify areas for improvement and expansion.

OUTCOMES



Since 2006, over **31,356** initial SOAR SSI/SSDI applications have been approved.



The 2016 approval rate on initial SOAR applications averages **67 percent** in **101 days**.



In 2016 alone, SSI/SSDI brought at least **\$317,641,152** into the economies of the participating localities

For more information, e-mail us at soar@praicn.com or visit <https://soarworks.praicn.com/>

2016 OUTCOMES

2016 Initial Applications



4,134
Approvals



67%
Approval rate



101
Average days to decision

2016 Appeals



734
Approvals



60%
Approval rate



196
Average days to decision

Cumulative Outcomes



31,356
Initial application approvals since 2006



65%
Cumulative approval rate since 2006



36,112
Individuals gained access to SSA benefits with SOAR (initial applications & appeals)

2016 Top 10 States*

Pennsylvania
Tennessee
Maryland
Arkansas
North Carolina

South Dakota
Washington
Rhode Island
Alabama
Kansas



84%
Approval rate

*Ranking based on cumulative approval rates. Inclusion in ranking required reporting in 2016 and at least 100 cumulative decisions.

2016 States with 1,000 Approvals*

Florida
Ohio
California
Pennsylvania

Georgia
Utah
Michigan
Tennessee

North Carolina
Minnesota
New York
Oregon

*Ranking based on approvals. Inclusion in ranking required reporting in 2016 and at least 1,000 cumulative approvals. Combined, these states have 21,411 approvals.

2016 Monetary Benefits

\$317,641,152
Brought into the economies of the participating localities

\$5,356,449
Received in back payments (1,001 individuals)

\$1,168,097
Medicaid & Medicare reimbursements (138 individuals)

2016 Employment

103
People working at the time of application



\$40,973
Total additional income

Use Tools from the SAMHSA SOAR TA Center to Explain the SOAR Process



SSA/SSDI Outreach, Access and Recovery Technical Assistance Center
SEPTEMBER 2016

Social Security Disability Recovery Stories of People Experiencing or At Risk for Homelessness

The following stories were submitted with permission to the SAMHSA Technical Assistance Center in response to a call for examples of how Social Security disability benefits have changed the lives of people who were experiencing or at risk for homelessness. They are just a few of the more than 20,000 persons who have benefited from SSAID since 2005. For more information on SSAID, go to <http://ssa.gov/ssa/grants.com>.

In Our Own Voices

Most stories in this issue were written by SOAR case managers or their supervisors, but those in this section were written by individuals assisted by SSA's case managers to apply for Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). In this section, names are used to denote the actual words of SSI/SSDI recipients who benefited from SOAR.

May lived in the streets of Albuquerque for many years. She has long unkempt hair and her face has many scars. She wears faded clothing that is very worn. One cold evening, she came to the clinic looking very ill and struggling to walk. They said she can no longer stand the pain in her feet and back. I looked down and saw that she was wearing 1 1/2 sizes and the soles of both feet were overlapping one another.

She explained that she had no one to depend on and 20 years for fear of getting bad news. She spoke about a daughter whose death "destroyed me normally, and I sat out for the streets. I mostly stay on the pavement. I don't like to be around people. People don't like to be around me. I have been called a witch and folk seem to say whatever they say."

When I thought up SSI/SSDI, she did not want to apply. For SSI/SSDI initially, as she felt she had not earned it. I gathered all the information I needed and an application was approved in two months. She now has housing, medical care, mental health care and, in her words, a life. She wrote the following:

I want to thank you for getting me out of bed. Even more thankful for the fact that you said it possible for my grandmother to have short programs in their lives, to share resources and be acknowledged. The case manager reached out to me and helped me. I stated in the beginning statement in my life. The fact she has given me a light for my life. Without her and your program I don't even want to think where I would be now. I got up in my 50s and 60s. Years of being alone living in abandoned cars, cold nights, and not having any money extra for me. Many thanks for a program that is truly needed. If you ever were person's life changed. Let's be a professional. I have been blessed to have had her support before me. I feel alive, gone in the past, turned and longer I held for many years.

*See "Involving Your Support in the SOAR Process" <http://samhsevents.org/resources/taresources.html>.

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- APPLICATION INITIATED**
Individual contacts SSA in person via phone, fax, mail, or online submission, establishing the protective filing date.
Once the protective filing date is set, the application must be submitted within 60 days.
- SSA DETERMINES NON-MEDICAL ELIGIBILITY**
SSA claims representative assembles and reviews the non-medical information.
- SSA TRANSFERS CLAIM TO DDS**
If the application meets non-medical eligibility requirements, SSA sends it to the state's Disability Determination Services (DDS), which is under contract to SSA.
- DDS DETERMINES MEDICAL ELIGIBILITY**
DDS assigns a disability examiner (a.k.a. "disability adjudicator"), who sends requests for medical records to all listed treatment providers.
Medical, functional, work, and other information is assembled and reviewed.
- DDS RETURNS RECORD TO SSA**
DDS shares applicant's electronic record with initialing SSA office with a decision on medical eligibility.
- SSA NOTIFIES APPLICANT**
SSA notifies the applicant of the determination decision by letter. If approved, the applicant may need to confirm information or establish representative payee at the SSA office.

HOW TO CONTACT SSA

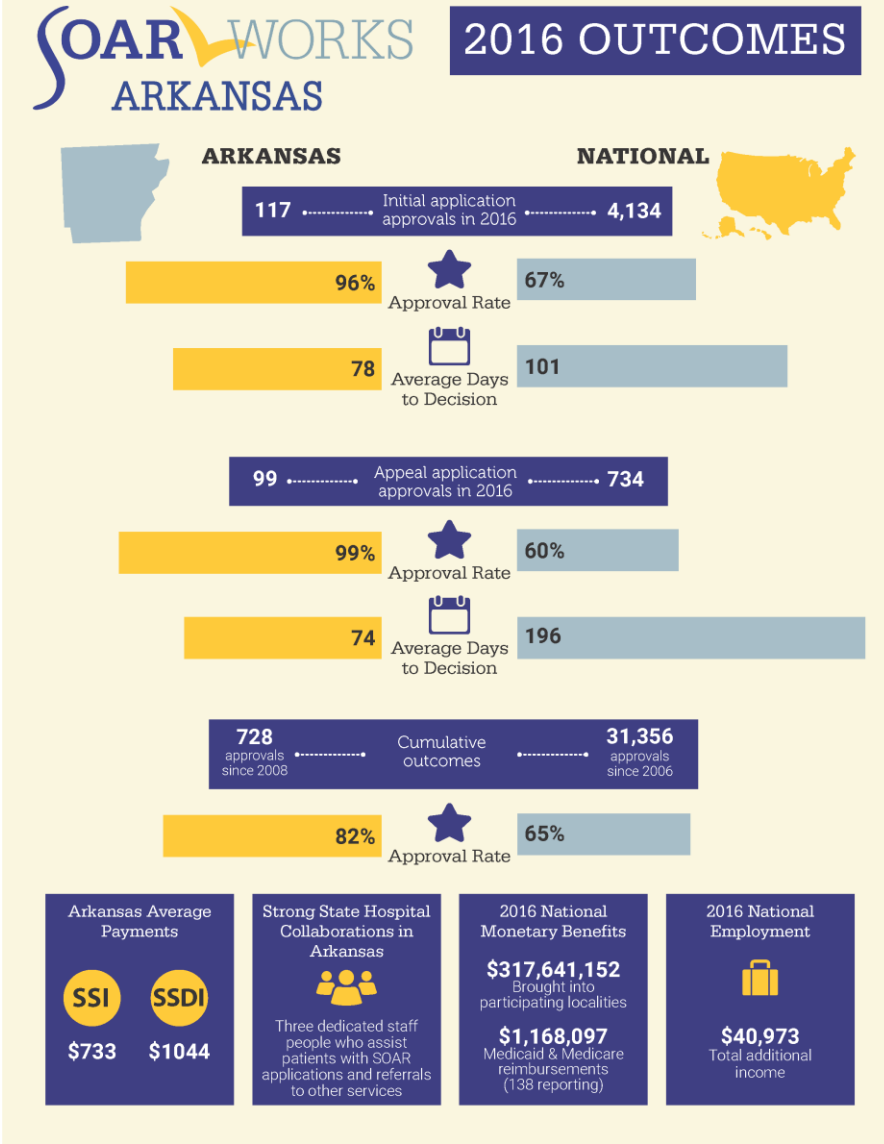
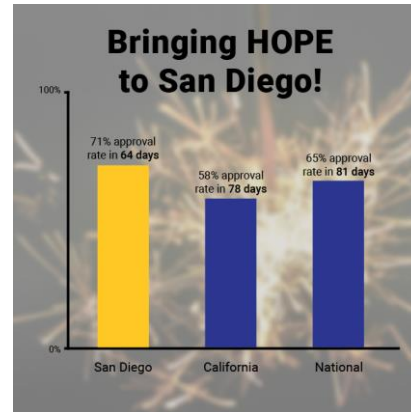
You are ready to submit your first SOAR-assisted SSI/SSDI application packet. Use this tool to decide the best way to contact the local Social Security Administration (SSA) field office.

Contact your SOAR State or Local Lead and ask if your area has an established SOAR process and designated SSA contacts. <https://soarworks.prairc.com/directory>

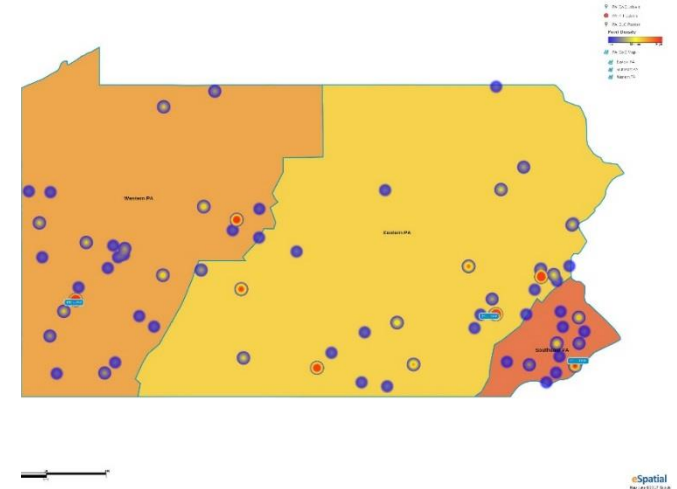
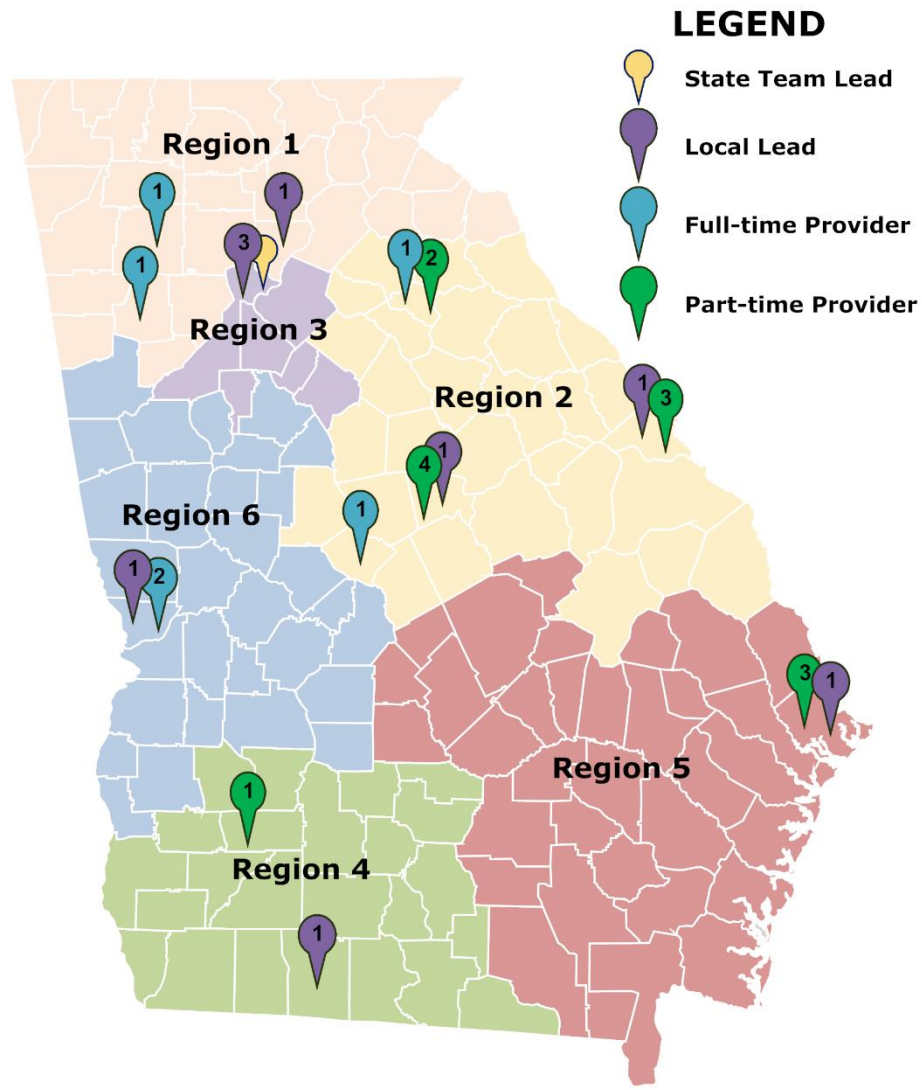
- Yes, your area has a SOAR process and/or SSA contacts!**
 - Follow your local SOAR process and file the application as indicated.
 - Track your outcomes!
- No, there are not yet SSA contacts in your area.**
 - File the (claim and ISSI (when applicable) online and then file the complete SOAR-assisted SSI/SSDI application packet at your local SSA office (Include all SSA forms, medical records* and the Medical Summary Report). The SSA claims representative may not be familiar with SOAR and that is okay!
 - Are you interested in helping build collaborations with SSA for SOAR in your area?
 - Yes!**
 - Reach out to your SOAR TA Center liaison for assistance and then contact your local SSA office's Homeless Coordinator to set up a meeting to discuss SOAR. <https://soarworks.prairc.com/content/contact-us>
 - Not right now.**
 - Keep filing quality, complete applications. Follow up with Disability Determination Services (DDS) and track your outcomes!

*If you have more than a few pages of medical records, hold on to them and submit to DDS using a bar-coded cover sheet or through Electronic Records Express (ERE). If fixing a large volume of records is not feasible, mail all medical documentation to the field office.

Use Resources from the SAMHSA SOAR TA Center to Share Stories of Success



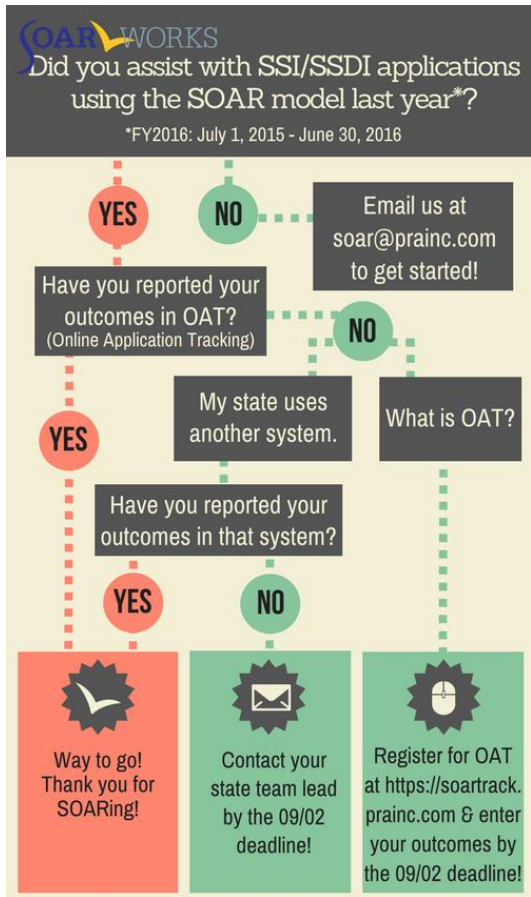
State Leads, Share the State- wide Impact of SOAR!



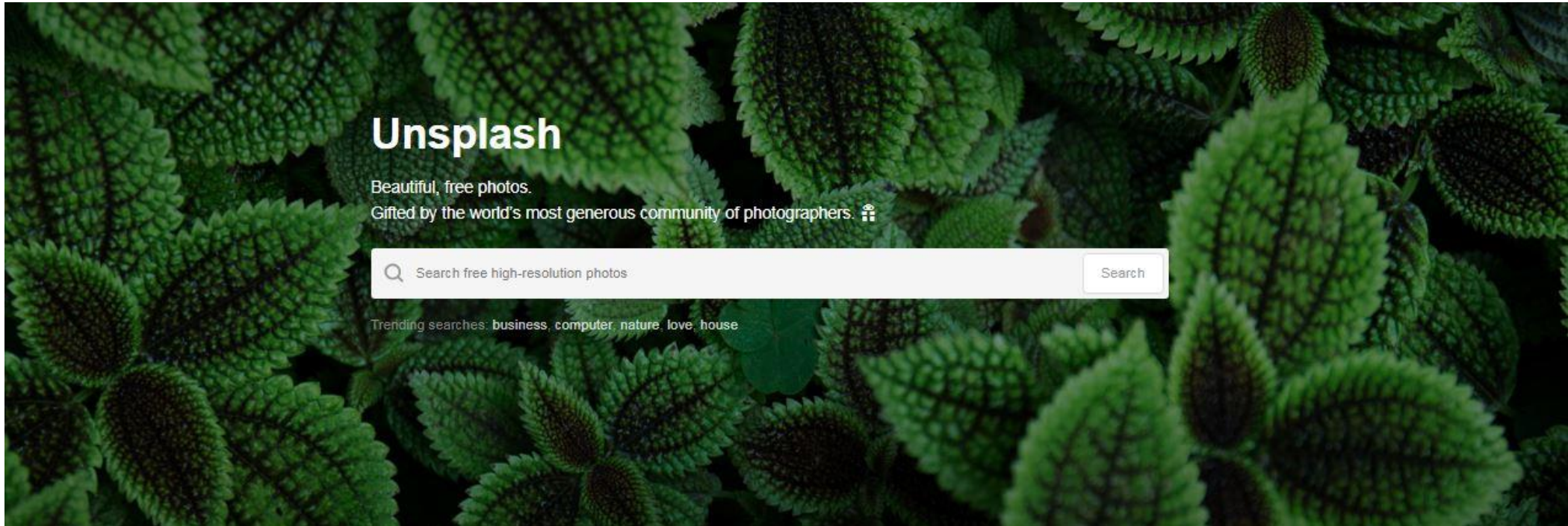


USING FREE AND LOW-COST TOOLS TO BUILD GRAPHICS AND WEBSITES

Build Your Own Graphics with FREE Tools



Use Unsplash to Uncover Beautiful, Free Stock Photos

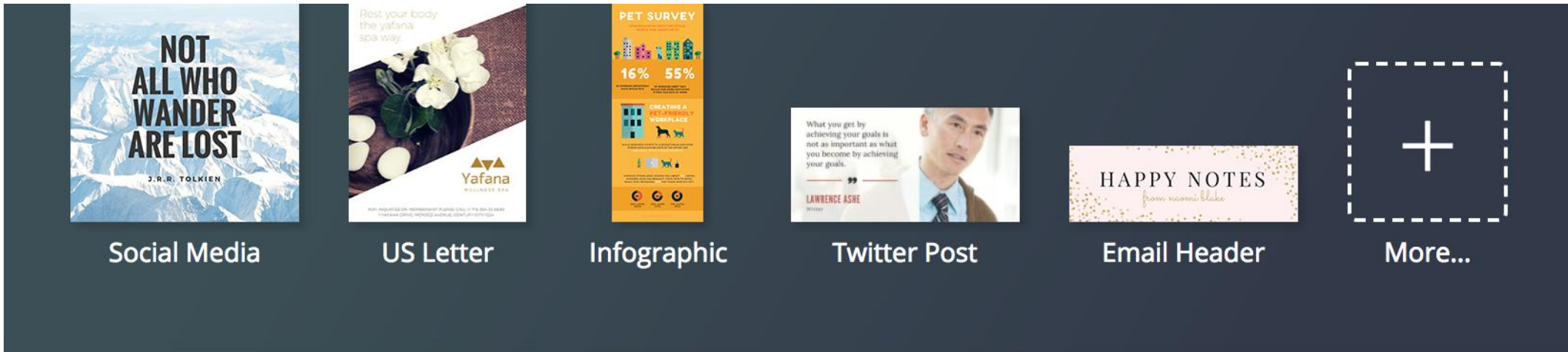


Pro tip: Use more abstract search terms to find images

Use Pixabay to Pick Pictures, Vectors, and Illustrations



Create Cool Graphics with Canva



Social Media

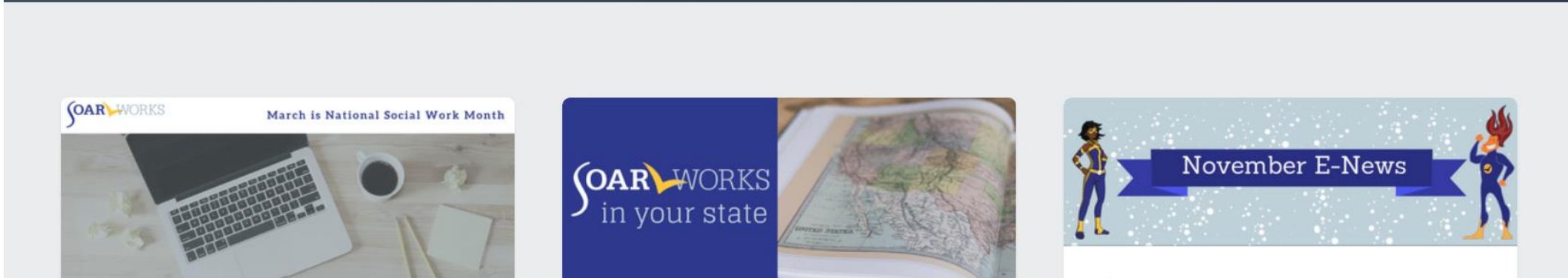
US Letter

Infographic

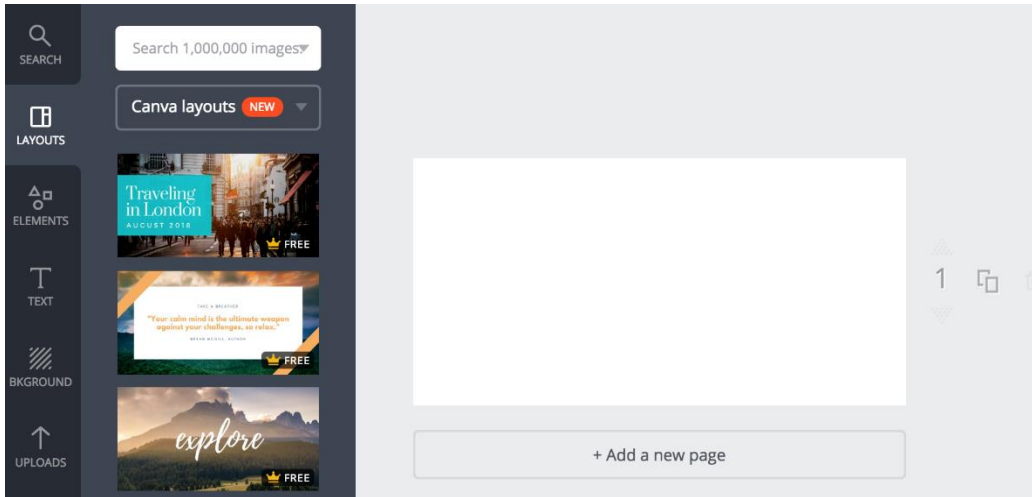
Twitter Post

Email Header

More...



Canva Provides Tutorials and Templates to Produce Quality Pieces



Getting Started with Canva

Fast-track your ability to create amazing designs by completing the Design Essentials tutorials course.

[See all tutorials](#)



Beginner's Challenge
[See details](#)

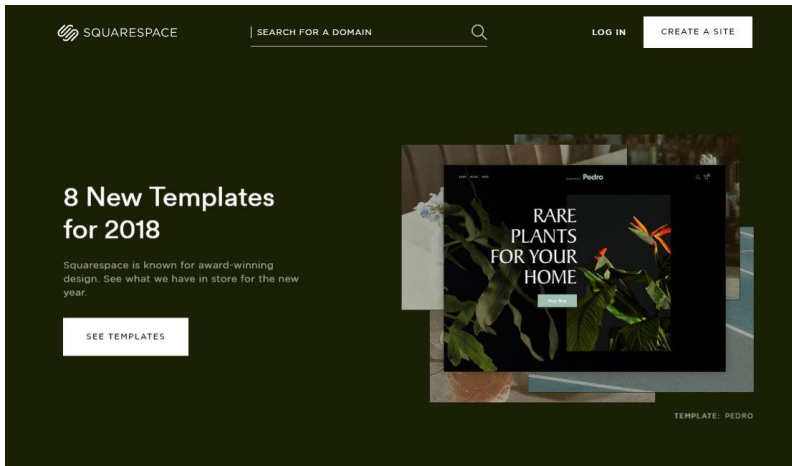


Essential Canva Tools
[See details](#)



Less is More
[See details](#)

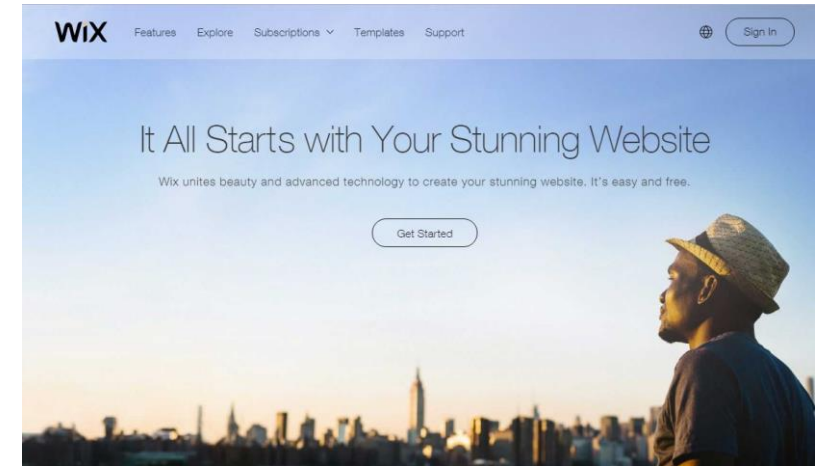
Build A Website With Low-Cost Tools



SQUARESPACE



WORDPRESS



WIX



DIVING INTO SOCIAL MEDIA

It's Time to Start Using Social Media

30% of all time
online is spent on
social media

Keys to Success:
Start Small, Have a Plan, Be
Authentic, and Post
Consistently

Track Your Data to Improve Your Messaging

CHANGE **Policy Research** @PollyResearch

Page updated daily

28 day summary with change over previous period

- Retweets: 6 ↑ 100.0%
- Tweet impressions: 3,368 ↓ 14.1%
- Profile visits: 121 ↓ 22.4%
- Mentions: 1 ↓ 83.3%
- Followers: 443 ↑ 1

Jan 2018 - 17 days so far...

Tweet Highlights

Top Tweet earned 413 impressions
 SHARE WIDELY – Calling all students! Policy Research Associates is seeking a graphic design communications #intern for this spring and summer! Learn more and apply on the PRA website: pra.tw/zrj30hAtCg pic.twitter.com/UKvi34R3gD

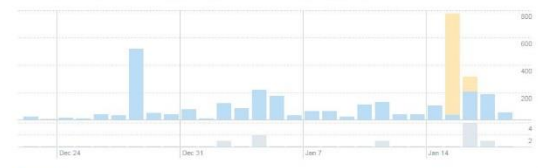
Top mention earned 5 engagements
 Wisconsin SPD @WisconsinSPD - Jan 16
 Tom Reed, SPD's Milwaukee Trial Regional Atty Mgr, participated today in Congressional briefing on "Trauma and Jails" in Wash DC. Moderated by @verainstitute, 4-person panel addressed trauma-informed care, @_PolicyResearch trainings, & needs of the incarcerated pic.twitter.com/luwTcro7ney

JAN 2018 SUMMARY

- Tweets: 6
- Tweet impressions: 2,479
- Profile visits: 87
- Mentions: 1
- New followers: 1

GRAPHIC DESIGN COMMUNICATIONS INTERNSHIP

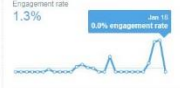
Your Tweets earned 3.4K impressions over this 28 day period



YOUR TWEETS
 During this 28 day period, you earned **119 impressions** per day.

Tweets	Top Tweets	Tweets and replies	Promoted	Impressions	Engagements	Engagement rate
Policy Research @PollyResearch · 23h	Please join us in welcoming Regi to PRA! Regi is joining our criminal justice team as a Senior Project Associate! Prior to joining PRA, Regi was the Executive Director of the Denver Office of Behavioral Health Strategies and Crime Prevention and Control Commission. Welcome, Regi! pic.twitter.com/wAB6zd7a5l	133	12	9.0%		
Policy Research @PollyResearch · Jan 16	A sneak peek at some new art around PRA HQ! pic.twitter.com/IBYm6Gz3ec	75	0	0.0%		
Policy Research @PollyResearch · Jan 16	Please join us in welcoming Stephen to PRA! Stephen is joining the SAVVY TA Center as a Project Associate. Before coming to PRA, Stephen retired after 20 years in the United States Marine Corps. Welcome, Stephen! pic.twitter.com/vpusX50ail	113	6	5.3%		

Engagements
 Showing 20 days with daily frequency



Link clicks: 49
 On average, you earned **2 link clicks** per day



Overview Promotions Followers Likes Reach Page Views Page Previews Actions on Page Posts Events Videos People Local Messages

When Your Fans Are Online Post Types Top Posts from Pages You Watch

Data shown for a recent 1-week period. Times of day are shown in your computer's local timezone.

DAYS

TIMES

All Posts Published

Reach: Organic / Paid Engagement Rate

Published	Post	Type	Targeting	Reach	Engagement	Promote
01/17/2018 2:03 pm	Please join us in welcoming Regi to PRA! Regi is joining our			95	8%	Boost Post
01/16/2018 4:42 pm	A sneak peek at some new art around PRA HQ!			151	10%	Boost Post
01/16/2018 3:36 pm	Please join us in welcoming Stephen to PRA! Stephen is			124	10%	Boost Post

Overview Page Summary Last 7 days Export Data

Results from Jan 11, 2018 - Jan 17, 2018
 Note: Does not include today's data. Insights activity is reported in the Pacific time zone. Aids activity is reported in the time zone of your ad account.

Actions on Page January 10 - January 16
 2 Total Actions on Page ▲ 100%

Page Views January 10 - January 16
 58 Total Page Views ▼ 15%

Page Previews January 10 - January 16
 16 Page Previews ▲ 60%

Page Likes January 10 - January 16
 We don't have data to show you this week.

Reach January 10 - January 16
 172 People Reached ▼ 57%

Recommendations January 10 - January 16
 We don't have data to show you this week.

Post Engagements January 10 - January 16
 56 Post Engagement ▼ 29%

Videos January 10 - January 16
 We don't have data to show you this week.

Page Followers January 10 - January 16
 We don't have data to show you this week.

DELIVERING POWERFUL PRESENTATIONS



Build a Presentation You Want to Sit Through

- Use 3 or fewer bullets per slide, 20 or fewer words
- Structure your presentation on messages
- Integrate images to illustrate your ideas
- Provide one-sheets with supplementary information

Don't start with doom and gloom

A convincingly dark picture makes solutions seem too dim to matter

Share solutions

Show them what success looks like—perhaps a success *story*—and then tell them the problems it avoids



Trios, Alliteration, and Rhymes

Life, liberty, and the pursuit of stickiness

Alliteration always arrests attention

A rhyme might feel lame, but it works all the same



Keep Your Slides Simple and Clear for
Maximum Retention

Liked What You Saw and Want to Learn More?

Contact your SOAR Liaison to get
started!





Marketing/Funding Toolkit for Sustainability

MATT CANUTESON
PROJECT ASSOCIATE
SAMHSA SOAR TA CENTER
POLICY RESEARCH ASSOCIATES INC.

Marketing/Funding Toolkit for Sustainability



SOAR programs across the nation are looking for new and exciting ways to inform government officials, potential funders, and stakeholders about the work that SOAR is doing to help people who are at-risk or experiencing homelessness access Social Security benefits. The purpose of this online toolkit is to help your SOAR program get information out about the work you do, and to help you access funding from foundations, private donors and businesses operating in your communities.

This toolkit is divided up into different easy-to-access pages so that you can effortlessly find the information and resources you need.

INCREASING YOUR ONLINE PRESENCE

Most people initially find the information they are looking for on the internet. It is important that you inform stakeholders (i.e. legislators, community service providers, potential volunteers and funders) about the amazing work you do in your community via the web. This tab includes information and



Strategies for Growing and Sustaining SOAR

CAROLINE BOLAS
MARYLAND SOAR STATE LEAD

Engaging providers

- In order to grow SOAR and obtain funding, often there is a need to show SOAR is successful, but it is hard to prove success without funding
- Even with funding, it probably won't cover all needs
- A key strategy needs to be getting/keeping providers and key stakeholders on board, even without dedicated SOAR funding

Using a Systems Approach

- Negative perceptions of a program can be hard to overcome and can make marketing problematic
- It helps to have a systematic approach to growing SOAR
- Effectively establishing SOAR in one area allows you to build on success – word of mouth can be the most effective marketing tool

Importance of Data as Marketing Tool

- Collect and emphasize the importance of data right from start
- Ensure you share data with providers and key stakeholders on a regular basis – not just annually
- Work with Disability Determination Services (DDS) to get comparison data
- Look at gathering longer term outcomes

Importance of Storytelling as a Marketing Tool

Collect and share success stories demonstrating impact of gaining benefits, for example:

- Write a blog
- Include in newsletters
- Ask successful applicants to speak to work groups or key stakeholders
- Produce a video

Quality Applications as a Marketing Tool

Emphasize from the start the importance of high quality applications through the following examples:

- Quality Review processes
- Work group meetings and refresher training
- Feedback from SSA/DDS
- Outcome data
- SOAR Certification and Recertification
- Annual conference

SOAR Certification Criteria

- Complete SOAR training
- Complete at least 5 SOAR applications, at least 4 of which must be approvals
- Submit self assessment form and 5 medical summary reports and corresponding data forms
- Applications reviewed by *Certification Review Committee* and written feedback provided to applicant
- After 2 years, must apply for recertification

Benefits of SOAR Certification

- Helps ensure quality applications
- Opportunity to recognize achievement
- Provides providers with evidence of professional development
- Helps enhance engagement and commitment to SOAR
- Provides a mechanism for obtaining feedback on what is working well, as well as, challenges being experienced

SOAR Conference

- Brings providers, stakeholders together
- Enables continuing professional development
- Provides opportunities for certified case managers to present on a panel or a workshop
- Chance to recognize achievement – “SOAR Value in Action Awards” and “Hall of Fame”
- Opportunity to market SOAR to new agencies
- Creates greater sense of community

Creating SOAR Community

- Celebrate successes
- Actively seek opportunities to recognize effort, as well as, achievement
- Act quickly to deal with issues
- Model a culture of positivity rather than focus on negative aspects
- Remember, word of mouth can beat glossy marketing tools— “Advocates can be the best marketing tool!”



Leading A Successful Local SOAR Initiative: Role of the SOAR Lead

RICH SCHIFFAUER
MARYLAND SOAR LOCAL LEAD AND TRAINER

SOAR: Part of the System

- SOAR is “systems connected,” it is not done in a vacuum
- SOAR is connected to PATH, COCs, HUD-VASH, and other programs
- Utilize the supports of your State SOAR Lead/National SOAR TA Center Liaison
- Important to identify key stakeholders before starting
- Identify how much time you are able to dedicate to SOAR lead duties

Marketing SOAR to Obtain Buy-In

- Identify who to outreach – homeless and behavioral health providers, corrections, VA, etc.
- Obtain buy-in from Agency Directors
- Sell benefits of SOAR, but don't oversell – be realistic about time commitment SOAR takes
- Do presentations to build enthusiasm
- Ensure direct service providers are also involved in work group meetings

The Initial Workgroup Meetings

- Have attendees participate in the development of the SOAR process for your area which helps with buy-in
- Develop specific referral process with SSA/DDS
- Identify how often the workgroup will meet
- Encourage consensus when making group decisions
- Keep promoting enthusiasm for SOAR
- Be realistic about time commitment of all involved

Preparation is Key!

- Obtain agreement from medical providers on signing Medical Summary Reports (MSRs)
- Communicate with local treatment providers on benefit of supplying medical records
- Set up processes with key partners, e.g.) Corrections, VA, homeless providers, etc.
- Set up a tracking log for SOAR referrals
- Set up a training between DDS and medical providers to discuss medical determination criteria

Medical Providers Training

- Included presentations by DDS's Chief Psychiatric and Medical Consultants
- Focus on DDS's evidentiary requirements and adjudication processes
- Primary Care doctors serving applicants experiencing homelessness and psychiatrists from behavioral health agencies participated
- Training kept to 3 hours so not too much impact on billable hours

Leading for Success

- Screen referrals – it is worth the time spent!
- Review Medical Summary Reports before they are sent to DDS – promptly turn around the feedback
- Promptly respond to questions/concerns: OK to say will find out if don't know the answer
- Provide technical assistance as needed to SOAR providers
- Maintain effective communication with DDS and SSA
- Immediately take any systemic issues to State SOAR Lead

Leading for Success

- Use workgroup to continually review SOAR procedures and to educate and support SOAR case managers
- Use work group as a forum for SOAR case managers to discuss what is working and what isn't, to share ideas and share successes
- Communication, communication, communication!!
- You can do this!

Questions and Answers

Facilitated By:

SAMHSA SOAR Technical Assistance Center
Policy Research Associates, Inc.

- Please type your question into the Q&A panel on the right side of the screen.

For More Information on SOAR

<http://soarworks.prainc.com>

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