

# **MARKETING PLAN**

## Human Services Resource Directories

**PRESENTED BY:**



# The Caplan Group

results driven advertising and public relations

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## Marketing Plan Human Services Resource Directories

### Executive Summary:

A sampling of research directories for Howard County Department of Citizen Services were reviewed and evaluated (see Appendix A) based on their distribution methods and marketing efforts. In addition, the current website was reviewed and evaluated (see Appendix B) Their value as print publications was assessed and a plan has been developed and recommended for production of the directories in the future as both a print and online product.

Currently, several of the print directories are being developed and published by The Baltimore Sun utilizing paid advertisements to offset the cost of production. The directories are comprehensive and several are produced that are in excess of 50 pages.

The Caplan Group, with over 20 years experience in advertising and marketing has spent the last seven years helping client's transition from the world of print to digital media. While the Internet has created tremendous opportunities for businesses and organizations to reach their customers, it does not preclude the use of print. It has, however, become necessary for businesses to reevaluate the use of their print and analyze how its use can support the efforts made online.

Our assessment of the print directories requires that they remain in production. An evaluation of the end user indicates that while the populations they serve reside in one of the wealthiest counties of the nation (Forbes, January 2008), there remains a percentage that prefer to continue to receive their information in printed form. Those that prefer printed materials include seniors and residents with limited or no Internet access. However, in order for the organization to remain effective in the near future we must focus on transitioning the directories online.

The fact remains that the number of seniors unfamiliar with the internet is shrinking; Internet access is becoming more and more desirable personally as well as professionally; and online use has become a way of life for those 50 and under with extreme emphasis on the younger generation. If particular attention is not paid to making the information from the directories available online in a clear, concise manner with intuitive navigation we will be unable to serve the majority of our citizens and our services will become invisible.

Online access is becoming more and more prevalent in today's society. It is a reality and one that must be embraced by every business and organization; especially those that provide much needed information to the community. Today's consumer rarely utilizes large, printed directories. This fact is supported by changes initiated by national businesses such as The Yellow Pages (a print

behemoth) that aggressively markets their online version as their printed directories continue to shrink in size.

A priority for the future of the print directories is effective, ongoing evaluation. The partnership with the production company has been cost effective to date, but it needs to be fully evaluated for its significance in delivering the message to the end user. While this partnership may be fiscally ideal, if continued it has the potential to “cost” us in the long run by not meeting the needs of our clients. Over the next few years more and more of our clients will be turning to the Internet to find information and it is our responsibility to provide them with an easy, effective way to find that information.

Making this information available online is a huge task but is essential to the organization's sustainability. This fact is supported by research conducted by the Pew Research Center a leading resource providing information on issues, attitudes and trends in the world relative to the internet: *A new research report on online government from the Pew Research Center's Internet & American Life Project shows that citizens are searching for information [online] in unprecedented numbers* (“Citizens turning to Internet for government data, policy and services”, Pew Internet, Media Mention, April 2010).

Evaluation of the print directories should include a tracking mechanism that provides an accurate count of the number of directories published, the various locations of distribution, the number of directories delivered per location, and a quarterly audit of the number of directories dispersed. The Caplan Group recommends that this be conducted by one or two individuals within the organization in a coordinated attempt to cull the information, analyze, and present accurate feedback and recommendations.

As indicated, we recommend that work on transitioning the directories online begins immediately and continues over the course of a 3-5 year period. This transition will not take the place of the printed directories during that time period. The objective for having the directories available via the Internet is to broaden the reach of the Department by assisting a greater number of end users more effectively.

Having the directory information available online in a web-based format (similar to the recently developed [www.HowardCountyFamilySupport.org](http://www.HowardCountyFamilySupport.org) site) with active links and intuitive navigation as opposed to a pdf file provides the user with quick, easy access to the information they want. A large, downloadable pdf file limits the Department's ability to easily update pertinent information and links. A large pdf file also prevents the user from quickly accessing the information they need – they must download the file then review the entire document to try and locate the information they need.

It is important to recognize that the future generations are being brought up in the age of the Internet. The students of today are accustomed to accessing their

information online and expect many of their needs to be fulfilled via the web. These same individuals are the future (and in some cases current) benefactors of the services provided by Howard County DCS, but they won't be looking for our information in a cumbersome directory. They will want (and expect) a referral for a reputable and trusted online resource.

A tremendous benefit to having the information available online is that it can be updated quickly and easily with the use of popular, easy to use content management systems. Unlike print, which is environmentally destructive, dated material the minute it comes off the press, the Internet provides a constant stream of current, relevant information that our users are able to access twenty four hours a day seven days a week.

This approach, combined with a regular audit of the printed materials, will enable Howard County Department of Citizen Services to effectively reach the largest number of users possible with up to date information that is easily accessible in multiple formats.

## I. Market Overview:

### A. Target Audience

1. Each directory produced has a specific target:
  - a. 2010 Howard County Office on Aging (older adults 55 plus and their families)
  - b. 2009-2010 Parent Guide to Howard County (parents, guardians and related family members)
  - c. A Directory of Services 2010 Provided by, *The Members of the Association of Community Services of Howard County- the general Howard County population*
  - d. The Mental Health Services in Howard County Directory, June 2009 (the general Howard County population).

### B. Size of Market (based on US Census data estimates for 2006-2009)

- a. Older adults 65 plus (excludes family members): 25,019
- b. Parents, guardians, related family members: 211,413 (estimated at roughly 75% of total population)
- c. Howard County population: 281,884
- d. General Howard County population: 281,884

## II. Product Overview

- A. Print directories: develop a clean, consistent look for all of the guides that are produced by the organization. Special consideration should be given to images used (current) and overall design or "look" of the cover.

- B. Website: a main objective of the site should be its usability. Special consideration to making the site user friendly and easy to navigate will be key to meeting the needs of the end user. Overall design should support the look and feel of the print directories to assist in “branding” the organization.
- III. SWOT (Strengths, Weaknesses, Opportunities and Threats)
- 1. Strengths: A number of organizations in Howard County have valued services to offer; comprehensive data is culminated and made available to the general public.
  - 2. Weaknesses: Massive undertaking required to transition from print to the web.
  - 3. Opportunities: Broadening the reach to our audience by making the directories available online and easy to access.
  - 4. Threats: Budget constraints.
- IV. Objectives
- A. To effectively provide resources for each of our distinct end users. This includes the general population as well as niche groups such as seniors.
  - B. To provide these resources in a manner that best meets the needs of our end user through the use of print and online materials.
  - C. To work on transitioning the available information (currently in print format) to a dedicated website that is designed to be attractive and highly functional with an emphasis on ease of navigation.
- V. Strategies
- A. Positioning
    - 1. Print directories: directories are available to the end user at a number of county government and local institutions. To effectively reach the target audience key assistance personnel (social workers, department staff, hospital counselors, etc.) should be added to the distribution list and inventory should be monitored carefully. Recommendation is for a monthly or quarterly follow up phone call to these key personnel to discuss distribution and obtain valuable feedback.
    - 2. Website: Tremendous awareness can be gained for this site through promotion and association as a County program. Special consideration should be given to search engine optimization (SEO) which will enable the site to gain prominence on results pages for major search engines like Google at no charge.
  - B. Marketing Mix
    - 1. Print directories: the packaging and styling of the print directories should be reviewed and adjusted to allow them to “stand out” when clustered with groups of other informational material. The quality of

the material is of particular concern and is currently being effectively leveraged with the depth of resources included. This should be monitored on a continuing basis and adapted as necessary. Distribution points should be reviewed and evaluated based on effectiveness on a quarterly basis and inventory management should be strictly regulated.

2. Website: Functionality should be the main priority for this content specific site. The sheer volume of information that will be included in the database requires that the site be easy to navigate from a user as well as a content management standpoint. The design of the site should support all of the printed materials and represent a consistent look that will “brand” the services.

#### C . Promotion

1. Print directories: budget limitations prevent paid advertising to be included in promotion. County resources should be leveraged and utilized as much as possible (messages on County website, utilization of social media to “push” information to the public either through individual departments [i.e. Office on Aging Twitter feed] or collectively through the County [i.e. Ken Ulman’s Facebook page]). Personal support by staff and executives should be encouraged with direct contact to key personnel (intermediaries who will likely use as a reference and provide end user with information), networking and public speaking engagements.
2. Website: Promotion of the website can be effectively and affordably managed by building it on a popular, easy to use content management system (such as Word Press). Built properly, the site will be search engine friendly and create a solid foundation on which to develop a search engine optimization (SEO) campaign that will enable the site to “float to the top” of free search results (the goal is always page one with inclusion as high up on the page as possible depending on the value of the keyword or phrase that we are optimizing for, ex. if the keyword phrase is “Howard County Citizen Services” the goal should be placement on page one within the first three listings).

#### D. Product - Literature

1. The production of the print directories needs to continue at this time. With proper inventory management and control, including a quarterly audit, data should be compiled as to the continuing effectiveness of the directories. With the fast adapting reliance on the Internet we must be continually evaluating the effectiveness of our print distribution and usage. While there are no hard fiscal costs associated with the production of the directories, as stated earlier, we bear the “cost” of not effectively meeting the needs of our user if we do not provide them the information they request in the format they desire.

#### E. Product - Website

1. A long term goal is to make the resource directories available on a dedicated website that is easy to navigate and provides users with easy access to all of the information they may seek. A short term recommendation for the existing web site that is imbedded within the County is the development of a separate web address that will point to (i.e. link) to the existing resource guide (ex. <http://www.HoCoResourceDirectory>). The reason for this is that currently the online resource guide is hard to find on the County site and requires the user to be fairly knowledgeable on where to go to get the information (for example they must first know that when getting to the County site they are to look under Departments and then know that Citizen Services is the department they are looking for). This web address should be promoted on the cover of the printed directories and continually through social media, network opportunities, and press releases.

#### F. Distribution

1. An exclusive distribution (i.e. direct mail) would be the ideal method of delivery (allowing for precision targeting and tracking); however budget constraints require an inclusive method be utilized. All directories should be distributed to associated County agencies and departments, bulk distribution locations including libraries, hospital, community college, non-profit organizations likely to be utilized by the target demographic, and key personnel who are likely to be referring the material to the end user.
2. Distribute to staff to hand out to the end user when they come to their locations or request information by phone or email. Due to postage expense it is strongly recommended that the option of emailing the pdf be offered.
3. Distribution at various site locations – MUST be monitored and audited on a quarterly basis to see if they are being taken.

#### G. Evaluation

1. Printed Directories: A preliminary number of directories should be produced based on input from each Department. A clear distribution plan that includes locations, quantities and re-stocking schedule should be developed and instituted. Each month/quarter an audit should be conducted of the materials at each of the distribution sites to determine usage. Adjustments can be made and noted over the course of the year to ensure that each location has adequate access to the materials they need. Totals at the end of the year should be reviewed and adjustments can be made at that time to the overall production numbers necessary. This analysis will not only allow for proper production totals and effective distribution, but provide the organization with a better

understanding of how their information is being accessed and at which locations.

2. Online: The analytics that are built into the website will allow for accurate data to be reviewed on a daily/monthly/quarterly basis. The analytics will provide information on such things as the number of visitors to the site, how those users found the site (ie. search engine, link from another site, etc.), and the pages within the site that are the most frequented. Much of the information provided by the analytics will enable you to continue to make your website better and allow you to “cater” to your end user.

#### VI. Action Plan/Implementation Schedule (Print)

- A. Distribution List: reviewed and updated immediately with input from key personnel in each department.
- B. Inventory: previous production numbers should be reviewed and compared to current distribution list, adjusted accordingly for current year’s production.
- C. Packaging and Style: a redesign of the covers should be considered immediately to help with branding of the services. Special consideration has to be given to the same look and feel being carried over to the website. \*PLEASE NOTE: print designs do not automatically translate well to web so the redesign should only be handled by an accomplished designer that is trained in both print and digital design.
- D. Content: current content management seems appropriate and should continue to be maintained.
- E. Evaluation: development of an effective evaluation tool should be implemented prior to materials being delivered to distribution points. This information should be closely monitored on a monthly/quarterly basis and be reviewed before next yearly production cycle.

#### VII. Action Plan/Implementation Schedule (Online)

- A. Secure a unique URL that can be individually promoted (ie. <http://www.HoCoResourceDirectory>) and allows user direct access to information.
- B. Update online pdf to make more attractive to the end user. Consider adding graphics and updating type font.
- C. Add significant phone numbers prominently and in bold to main page of current website to give the end user information they can access immediately.
- D. Include link for Google Maps on the various departmental pages. There is no cost for this service and will allow end user to quickly find the locations they are searching for such as a Senior Center or The Child Care Resource Center.
- E. Consider future development of a separate website that provides the resource information desired. Making the information available online

in this manner will make the experience more user friendly for the target demographic and ultimately be more effective in meeting the needs of the end user. The print publications require updating and management of the resources so the level of data management will be the same, but the website will provide the benefit of being able to update information immediately as opposed to waiting annually to update a printed manual.

## **APPENDIX A**

### **Evaluation of Resource Guides**

March, 2010

#### **Current Web Based Guide**

On the HowardCountyMd.gov site in the Department of Citizen Services section there is a comprehensive “2008 Citizen Services Human Services Guide”. This guide is over 100 pages and can be downloaded in a printable pdf. by a visitor to the site

(<http://www.howardcountymd.gov/citizensservices/servicesguide/humanservices.html>).

There is also a totally separate digital version. The digital version features all the human services offered by Citizen Services and non profits in Howard County. It is categorized alphabetically. It is comprehensive and provides valuable information to the visitor. However, unless the visitor knows exactly what they are looking for they could easily be confused.

The goal of the guide is to list all the services and programs provided by government agencies and non-profit groups. It first lists the services in a table of contents and subject manner and then provides the name of the agency, a brief description, phone number, email contact and the web address. It is a wealth of information because of its depth and detail but it is not particularly web friendly to the user. It was designed for a printable version and not a web version because there are web addresses but there are no links to the sites.

#### **Recommendation:**

Make the guide more user friendly for visitors by combining the digital resource guide with the printable version. Use the strengths of both to create one dynamic Resource Guide housed in The Citizen Services section of the Howard County Government site. There is no need for two versions.

#### **Implementation:**

- 1) Create a page within the Department of Citizen Services section of the site and copy the information to the page. This will enable the embedded links to become interactive for the user. It is strongly recommended that the links open up in a separate window to allow the user easy navigation and prevent them from being taken away from our site. By doing this you will eliminate the need for a separate digital version.
- 2) Utilize the back end of the site to see what pages visitors have viewed. There are two years of data to mine. This analysis will help determine which services are more important to the end user (frequency of visits) and determine the number of times the printed version has been downloaded by a visitor.

## **Resource Guides**

Three have been developed in partnership with Custom Media/The Baltimore Sun Media Group:

- 1) 2010 Howard County Office On Aging
- 2) 2009-2010 parent guide to Howard County
- 3) A Directory of Services 2010 Provided by, *The Members of the Association of Community Services of Howard County*

All three provide valuable information for the end user and it is understood that The Baltimore Sun provides the development and printing of the guides at no cost, which is very important in the current economy. Please note that this is a revenue stream for a bankrupt company that needs to get back to profitability. Does the County share profits with Patuxent Publishing? What exactly is the financial agreement with Patuxent and the County? Perhaps the County should be paid a “rights fee” in addition to “free” printing if Citizen Services continues with the directories in their present form.

However, including paid advertisements within the directory allows the larger businesses to promote themselves and get an unfair commodities advantage because a full page ad can give the impression to an end user that they are a more important service; a business that does not have a large marketing budget is included only as a listing and could be over looked. In addition, paid ads in a government/non profit “resource guide” bring into question the creditability of the guide: *Does a big advertiser get to control content?* The importance of content is diminished by advertising.

### **Recommendation:**

Have a consistent look for all the guides that are produced by the Department of Citizen Services.

### **Implementation:**

Develop an identity that can be utilized for any department but has a consistency that can be easily recognized.

Create a standard for quality of the guide. The paper stock needs to be consistent as does the use of color and formatting. The covers of the guide need to invite a reader to engage and not be overly cluttered.

## **The Mental Health Services in Howard County Directory, June 2009**

Sponsored by the Howard County Mental Health Authority, this is a comprehensive 67-page booklet that provides the end user with a wide range of useful information concerning mental health services. The information is extremely good and certainly helpful, although rather cumbersome at 67 pages.

**Recommendation:**

Consider condensing the size of the reference guide.

**Implementation:**

We strongly suggest that there be some way of condensing the information with key phone numbers and websites. On the front and back cover there is no website a person can visit to get quick information. The phone number on the cover is the office number that only operates during normal business hours. After hours you are directed to the Howard County Mobile Crisis Team number 410-531-6677 if you are having an emergency during the hours of noon to 11pm seven days a week; after those hours you then are directed to the Grassroots 24 Hour Hotline. The end user is in need of reliable information quickly.

**Consider editing the booklet and creating an online version utilizing key information with links to the various agencies, organizations, and care providers websites.**

**Distribution:**

**The Howard County Office on Aging Resource Guide** had 24,000 copies printed according to The Baltimore Sun ( is there an actual printer's verification that this number was printed?) How was that number determined? There is a formal process in place to get the first batch of Guides distributed to defined locations. A person is paid to drop the guides to these locations. Afterwards, the locations call if they are in need of more copies or "the driver" determines there is a need for a restock. Hence, there is no formal process to know if the guides have been taken at the various locations. It is "assumed" that all of the units are disseminated and generally they run out just prior to the next printing that is done on an annual basis; this is all speculation.

**Recommendation:**

We suggested implementing a formal production and distribution process to get a better understanding of how useful the books are and if they are effectively reaching the target audience.

After reviewing all the Resource Guides, and taking costs into consideration, it is our recommendation that they continue to be utilized; however, the new FAMILY SUPPORT logo & URL stickers should be added to them. This will give the end user a quick reference.

In the future we recommend that every guide have a firm production, distribution and review system in place. Once this is established and utilized the individual Departments will have the information they need from distribution to effectively analyze production. The Departments should have enough information after just the first twelve months to determine if they are printing the correct amounts and adjust those amounts going forward as necessary to meet the demands of the end user.

The information in the directories needs to be edited and should follow the recommendations outlined in the marketing plan. Any printed resource guide offered by the Department of Citizen Services should have a digital online companion version. If a digital component is not included then the majority of end users will not be accessing the information the various departments have determined are necessary.

## **APPENDIX B**

### **Web Site**

### **Citizen Services Evaluation**

The biggest barrier to someone accessing information about the services that The Department of Citizen Services offers is finding it on the county government's home page. The tab "Departments" on the left hand side needs to be clicked, then you need to recognize that Citizen Services is the department you need. This could be confusing for a person looking for a particular service.

We suggest that it would be very helpful if Citizen Services could create a separate web address for the online resource guide that is available and promote it separately. It would point to the online resource guide available within the Citizen Services pages in the county's website. The online version is useful but it takes a knowledgeable user to find it within the county site. We are concerned that visitors to the county site may not find what they need and a person in need of citizen services sometimes need to access information easily and quickly.

We recommend making the online resource guide more attractive to the user. The alphabet index is cold and stark. A better use of type fonts and some graphics could make it more user friendly. People seeking the services of Citizen Services are, many times, in a vulnerable position and a warmer welcome could help them as they navigate the Citizen Services various pages of information.

On the home page of Citizen Services we suggest some big and bold call out phone numbers similar to the Family Support phone numbers for crisis intervention, foreign-born residents, child care, older adults and people with disabilities.

Hopefully with the "new" Family Support Icon on the county home page that will help visitors access needed information fast and easy. The Family Support web site will provide phone numbers and links to useful sites.

Citizen Services has done a good job of structuring the variety of services they offer on the County website. Unfortunately, there are limitations of design and structure within the county site, but we feel you have done a satisfactory job of providing a lot of useful information that a visitor needs. However, because it must be housed within the county site we feel that lots of valuable information is not properly given the attention it should receive.

We recommend having call out phone numbers on each page that are visible and easily identifiable. Some pages have a phone number and others do not. Visitors on the site are searching for particular information and if they can't find it they want immediate help.

We recommend having Google Maps available to the different citizen services locations on their respective page. This does not cost anything and can help folks better locate a Senior Center or The Child Care Resource Center.

It is important to analyze the statistics of the website. This allows you to evaluate the different pages on the site and see what has generated the most traffic and eventually rearrange the site accordingly. The most visited pages should get the most attention on the site and be located up front. The Citizen Services website should be user driven. Your visitor's history will tell you what they are looking for and you do have several years of valuable data available stored on the Citizen Services pages.

## APPENDIX C

### Questionnaire: Resource Guide Distribution

**Agency / Department / Organization:** \_\_\_\_\_

**Contact person:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Surveyor:** \_\_\_\_\_

How many publications do you print, # of each?
Do you pay for the printing of your publication or are there other forms of payment not cash?
Is your publication annual, quarterly, monthly? What is the timing for production and distribution?
What happens to the non distributed units and do you assess the loss count and adjust the next years copy count + or -?
Where are the publications distributed? (Number, type of location and targeted population)
Do you have an official list of those distribution locations? Do you add additional locations? How does that occur? Do you have marketing people or people responsible to carry out the task?
How often do you do a restock and how is that determined? Do they call you or do you call upon them and is it on a consistent basis? If so, what management and tracking tools do you use?

How are the resources distributed? ( staff, volunteer or contractor) Does this have a cost? And how is this cost determined?
Do you do a distribution count and do you do your re-stocks based on this information?
Do you get a written confirmation on the number and date of the delivery as well as the number of units printed?
Do you have a central contact person at each of the distribution locations?

- What recommendations would you have to improve your present system for distribution of the resource guides?
- On a scale of 1-10, 10 being the highest, what is your assessment of the value to the end user of the resource guides in their present form?
- Has there been any communication with the “end users” of your resource guide to determine their importance and if an electronic version would be of equal or greater value?