



Review of Promotional, Educational and/or Informational Materials Procedure

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Veronica Kelley, DSW, LCSW, Director

Purpose The purpose of this procedure is to provide guidance to the San Bernardino County (County) Department of Behavioral Health (DBH) and contracted provider staff regarding the roles, responsibilities and steps for submission, review and approval of collateral materials by the DBH Public Relations and Outreach’s (PRO) review team.

Background A review team for collateral materials is established within DBH PRO in order to maintain the integrity of collateral materials produced by DBH, its staff and the County. Responsibilities include review of grammar, readability, cultural competency and County branding.

Role and Responsibilities The following table outlines the roles and responsibilities for development of collateral materials by a DBH or contract provider program.

For DBH Programs

Role	Responsibilities
Program Manager or designee	<ul style="list-style-type: none"> • Creates the collateral material following PRO (BOP3031) and County Human Services guidelines • Submits draft material(s) to the PRO email (DBH_PIO@dbh.sbcounty.gov) • Submits draft materials at least thirty (30) days prior to the intended dissemination date • Disseminates only PRO-approved collateral material(s) and/or • Corresponds with PRO for other methods of promotion (i.e., social media, web blast, email) • Coordinates with DBH Workforce Education and Training (WET) for Learning Management System registration, if applicable <p>Note: Additional information on how to submit collateral materials for PRO review is available in the <i>Procedure for DBH Program Materials</i> section of this document.</p>

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Role and Responsibilities, continued

Role	Responsibilities
Program Deputy Director or designee	<ul style="list-style-type: none"> Reviews materials prior to submission to the PRO inbox and/or at the request of DBH Public Relations Manager or a review team member
DBH Public Relations Manager	<ul style="list-style-type: none"> Reviews and approves materials prior to dissemination and/or submission to San Bernardino County Human Services.
Review Team Member	<ul style="list-style-type: none"> Saves the materials in the Approved Materials Folder Returns the materials to the DBH program Deputy Director or designee for dissemination

DBH Contract Providers

Role	Responsibilities
DBH Program Manager and/or designee for the Contract Service Provider and/or Program	<ul style="list-style-type: none"> Conducts initial review of document to verify accuracy of contract specifications/violations (i.e., flyer includes appropriate terminology for target audience and is provided in English and Spanish) <ul style="list-style-type: none"> If errors are found, the DBH Program Manager or designee are to return the document to the contract provider for corrections prior to submitting to PRO for review Submits the approved draft materials to the PRO inbox (DBH_PIO@dbh.sbcounty.gov) within two (2) business days of email receipt Returns approved collateral material to contract provider in a timely manner (usually within five (5) days, but not to exceed fourteen (14) days) <p>Note: Additional information on how to submit collateral materials for PRO review is available in the <i>Procedure for Contract Provider Materials</i> section of this document.</p>
Deputy Director or designee	<ul style="list-style-type: none"> Reviews materials prior to submission by the PRO inbox and/or at the request of DBH Public Information Officer and/or review team member
DBH Public Relations Manager	<ul style="list-style-type: none"> Reviews and approves materials prior to dissemination

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DBH Review of Promotional, Educational and/or Informational Materials Procedure, Continued

Role and Responsibilities, continued

Party	Responsibilities
Review Team Member	<ul style="list-style-type: none"> • Applies necessary edits • Saves materials in the Approved Materials Folder • Returns materials to the DBH Program Manager or designee returns the material to the contract provider for dissemination

Steps for DBH Materials

The below table outlines the review process for internal and external collateral materials created by DBH staff and/or promoting DBH and/or County Programs. External and/or primarily public facing collateral materials must be translated into Spanish by the DBH program designee and included with the initial submission to PRO. The complete review process may take up to twenty-one (21) business days from the date of submission to DBH PRO.

Note: Review time may be extended if collateral materials are lengthy (i.e., booklets, manuals, Power Point presentations, etc.) and/or require additional review from a subject matter expert, or requested changes are delayed.

Step	Action
1	<p>DBH program designee creates collateral material according to the most current County Brand Style Book.</p> <p>Note: If applicable, program designee is responsible for coordinating any necessary training hours with DBH WET and/or the Office of Cultural Competency and Ethnic Services (OCCES) prior to including registration information on the collateral material.</p>
2	<p>DBH program designee submits the collateral material to the PRO inbox (DBH_PIO@dbh.sbcounty.gov).</p>

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DBH Review of Promotional, Educational and/or Informational Materials Procedure, Continued

Steps for DBH Materials, continued

Step	Action
3	<p>PRO Review Team member corresponds with the Public Relations Manager and DBH program designee regarding edits and recommendations.</p> <p>Note:</p> <ul style="list-style-type: none"> • Non-editable materials (i.e., PDF, JPEG) and/or materials requiring more than 15 minutes of Public Relations Manager's edits will be sent back to the program designee for edits and re-submission to PRO. • If the material includes clinical recommendations/facts/resources, the document will require citation and further approval by the Program's Deputy Director, Program Manager, and/or a subject matter expert (if not already obtained prior to submission)
4	Review Team member submits the collateral material to County Human Services Communication staff.
5	Review Team member returns the approved collateral materials to DBH program designee.
6	DBH program designee disseminates the collateral material as needed or corresponds with the review team for other methods of promotion.

Steps for Contract Provider Materials

The following outlines the review process for DBH Contract Provider materials.

All steps may take up to fourteen (14) business days to be completed from the date of submission to the final DBH PRO email. This time frame may be extended if the review material is lengthy (i.e., booklets, manuals, Power Point presentations), requires review from a subject matter expert, or requested changes are delayed.

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DBH Review of Promotional, Educational and/or Informational Materials Procedure, Continued

Steps for Contract Provider Materials, continued

Step	Action
1	<p>DBH Program Manager or designee receives the collateral material from the contract provider and conducts an initial review for errors pertaining to contract specifications/violations (i.e., flyer includes appropriate terminology to reach target audience; flyer is provided in English and Spanish.)</p> <p>If errors are found, the Program Manager or designee must return the document to the provider for corrections prior to submitting to PRO for review.</p>
2	DBH Program Manager designee emails the approved material to the PRO inbox (DBH_PIO@dbh.sbcounty.gov) within two (2) business days of receipt.
3	<p>Review team corresponds ONLY with the DBH Program Manager or designee regarding edits and recommendations. Non-editable materials (i.e., PDF, JPEG) and/or materials requiring more than 15 minutes of edits are sent back to the DBH Program Manager or designee for edits and re-submission to PRO.</p> <p>Note: If the material includes clinical recommendations/facts/resources, the document will require citation and further approval by the program's Deputy Director, Program Manager, and/or a subject matter expert.</p>
4	Upon approval, Review Team member emails the collateral material to the DBH Program Manager or designee.
5	DBH Program Manager or designee returns the material to the contract provider for dissemination.

Note:

- Correspondence remains between PRO review team members and the DBH Program Manager or designee. PRO **does not** correspond with the contract provider.
- Contract material **is not** to be County branded, but must follow [DBH Contract Provider Checklist](#).

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Related Policy or Procedure

DBH Standard Practice Manual:

- Public Information and Media Release Policy ([BOP3007](#))
 - Guidelines for Promotional, Educational, and/or Informational Materials Policy ([BOP3031](#))
 - DBH Review Panel for Promotional, Educational, and/or Informational Materials Procedure ([BOP3032-1](#))
 - Non-Discrimination – Section 1557 of the Affordable Care Act Policy ([COM0953](#))
 - Providing Written Communications in Threshold/Primary Languages for Consumers/Family ([CUL1013](#))
 - Electronic Mail Use Policy ([IT5005](#))
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Reference(s)

- [DBH Contract Provider Checklist](#)
 - [DBH Collateral Material Checklist](#)
 - [County Brand Standards Guide](#)
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