



Benefits Outreach Toolkit: Guide to Using Facebook Ads



National Council on Aging

ncoa.org

  @NCOAging

Guide to Using Facebook Ads

If your organization is interested in using Facebook advertising to reach people potentially eligible for benefits, here's what you need to have ready.



Must Have

- An organizational Facebook page
- Staff time to devote to implementing (or learning how to implement) Facebook advertising campaigns, managing and compiling data, and quickly following up with seniors who complete a survey after clicking through the ad



Nice to Have

- Website developer and/or tech support to implement the online survey
- Designer for tweaking and adapting ad messages and images for your audience



Cost/Resource Implications

- Costs for running Facebook ads can vary widely depending on the size of the coverage area and staff capacity. A recommended starting point is \$500/month on the ads and 5-10 hours/week of staff time for management of the ads and following up with respondents.

What is a Facebook ad?

Paid advertising on Facebook is a way to reach people who may not know about your organization or follow your page. Ads appear in the user's news feed or right column of the page, and can be tailored to specific groups of people based on location, demographics, and interests.

Key terms

Here's a quick glossary of terms used throughout this guide:

- **Leads** are people who click on the Facebook ads and submit their information requesting to be contacted by your organization. **Qualified/quality leads** are those leads who screen eligible for at least one benefit.
- **Creative** describes the way your Facebook ads look and read, meaning images and text.
- A **call to action** or **CTA** is usually a button that requests people who see your ad to do something, such as download, find out more, sign up, etc.
- An **impression** measures the number of people who see your ad – but not those who actually click on it to get more information.
- The **click-through rate** or **CTR** is calculated by dividing the number of people who clicked on your ad into the number of impressions, or people who saw the ad.
- The **cost per lead** or **CPL** is calculated by dividing the number of leads (people who click on the ad and complete the form to submit their information to you) into the amount of money you spend on the ad.
- **Cost per acquisition** or **CPA** is calculated by dividing the number of qualified leads (people who screened eligible for at least one benefit) into the amount of money you spend on the ad.

Why and how would I use Facebook ads?

An increasing number of [older adults are using Facebook](#). Advertising on Facebook allows you to reach this population, as well as their caregivers and friends, who may not be aware of your organization and/or the public benefits available to Medicare beneficiaries with limited incomes.

Before we explain how to set up a Facebook ad campaign, here is a breakdown of how an ad for benefits might work.

1. A senior sees your Facebook ad in her news feed. The ad encourages her to find out if she is eligible for benefits by taking a short online survey. She clicks on the survey link and is directed to an online form.
2. The senior completes the brief online survey, which asks general questions about her age and location (and possibly income level/participation in benefits programs). Once the senior submits the survey, her information and contact details are stored, and she is considered a *lead*.
3. Your organization gets the survey results and, as quickly as possible, your staff calls the senior to follow up and screen her for benefits, and helps her with submitting applications. **This follow-up should occur within 24 hours if possible, but no longer than one week after the form is completed.**
4. If the senior is eligible for benefits, record that information and consider her a *quality lead*. Comparing the number of *quality leads* you get from Facebook advertising with how much you spend on the ads can help you determine whether this is a good tactic for helping you find seniors who are eligible for benefits.



Planning and Preparation

Audience

Before setting up your ad, you'll want to decide who you want to reach. Do you wish to serve more people of a certain age, gender, or in a specific location where you know seniors may not be connected to benefits?

An important goal is to only run ads to people who live in the area served by your organization/agency. That may mean an entire state, several counties, or a single city. Targeting your audience by zip code is a successful way to ensure that the ads reach the areas and people you want to get your message. Generate a list of all zip codes you want to include to share with the staff member setting up the ads.

Lead volume

Before you launch the ads, determine with your organization's capacity for following up with leads (i.e., people who click on the ad and complete the form). It is recommended that your follow-up begin with 1-2 phone calls, followed by an email if the individual cannot be reached. Ideally, this follow-up should occur within a 1-2 week period (sooner is better). Determine how many leads can be followed up with on a weekly basis and strive to hit that number. Setting a weekly lead goal will help you determine ad budget and timeline.

Note

When NCOA and its marketing firm partner M+R tested Facebook ads in six pilot campaign sites, the ads generated approximately 30 leads daily.

Remember, at any time, you can pause the ads, but running them continuously will make the project more efficient. Therefore, it is important to set realistic expectations for your team's capacity to follow up with leads.

Scheduling

Lead volume will play into the scheduling considerations you make during your ad campaign. We recommend running the ads 24/7 (generating a daily pool of leads) unless your site won't be conducting outreach/follow-up on weekends. In that case, you can pause the ads on Thursday and Friday so there isn't a huge pool of leads waiting for the team on Monday (and to avoid delayed outreach).

Set internal deadlines for your campaign. We recommend running the ads for at least 2-3 weeks. Once you have internal deadlines set, consider when you may need to pause your ads. Examples may include: holidays, time periods you're running other benefit enrollment campaigns (such as PSAs), days where outreach staff can't do follow-up, etc.



Designing your online survey form

Before you set up your ad, you will want to create an online survey form to capture seniors' information. [This landing page](#) on NCOA's website provides an example of a survey form.

When designing a landing page for a survey be sure to:

- Limit the number of questions overall.
- Make essential questions required.
- When possible, hide outside navigation links above and below the form to encourage people to complete the form instead of clicking to other areas of the site.
- Make the form easy to read by placing it high on the page, so users don't have to scroll down to complete it. Also, increase the font size and consider what the experience will be like for users on mobile phones.

We recommend including these required fields in the survey:

- First name
- Last name
- Birth date
- Phone number
- Email
- Zip code
- Annual household income for you and your spouse (if married)
 - Categories to include: Under \$15,000; \$15,000-\$20,000; \$20,000-\$30,000; \$30,000-\$40,000; \$40,000-\$50,000; \$50,000-\$75,000; \$75,000 or more
- Are you currently enrolled in any of the following benefits programs? Check all that apply
 - Medicare Part D Extra Help (LIS)
 - SNAP (Supplemental Nutrition Assistance Program)/Food Stamps
 - Medicare Savings Program (MSP)
 - Low Income Home Energy Assistance Program (LIHEAP)
 - I'm not sure
 - *Note:* This field is optional but may be useful for outreach staff as they follow up with leads. Generally, people who are already enrolled in some benefits have a better understanding and recognition when your team follows up.

Choosing a survey tool

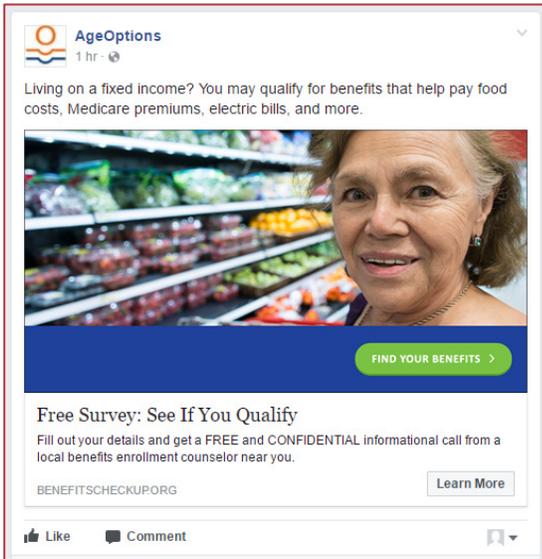
There are a variety of tools you can use to create your survey form.

1. [Facebook Lead Ads](#) form

Facebook's Lead Ads allow for a quick and private way for users to sign up and receive information from businesses, like newsletters, offers, and quotes. With Lead Ads, you can direct people from your ads to a form that's pre-populated. Also, Facebook will autofill the form with any information included in the user's Facebook profile, making it easier for the senior to complete. With this option, all data is housed within Facebook, so you don't need to store it elsewhere. It's fast to create and the simplest method to start running ads!

AgeOptions, a Benefits Enrollment Center in suburban Chicago, tested Facebook Lead Ad; and found that the platform:

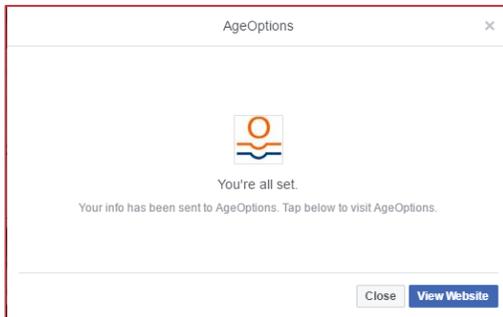
- Made it easier to transfer new leads to staff for quick follow-up.
- Was cheaper than sending people to an online survey.



Facebook Lead Ad example from AgeOptions

A screenshot of a Facebook lead form for AgeOptions. The form is titled "AgeOptions" and includes the logo. Below the logo, it says "Learn more by providing your info below." The form fields are: Email (hlafleche@mrrs.com), First name (Hayley), Last name (LaFleche), Phone number (+1, Enter your answer.), Zip code (US, Enter your answer.), and Date of birth (May 12, 1993). At the bottom, there is a "Cancel" button and a "Submit" button. A privacy notice is visible at the bottom of the form: "By clicking Submit, you agree to send your info to AgeOptions who agrees to use it according to their privacy policy. Facebook will also use it subject to our Data Policy, including to auto-fill forms for ads. Facebook Data Policy AgeOptions Privacy Policy".

Facebook lead form



Facebook lead form thank you screen

A few important notes on running Facebook Lead Ads:

- You cannot edit the lead form after creating it, so take special care in creating one that gathers the information you need for your campaign. If you need to take a break and continue building the form later, save your form as a draft by clicking "Save"; clicking the "Finish" button will make the form uneditable. If you do make a mistake, create a second form and archiving the first, which you can do by viewing the Form Library from the Publishing Tools section of your Facebook page.
- You cannot ask for sensitive information, such as income, through the Facebook lead form.
- You must link to a Privacy Policy when creating Lead Ads. If your site has an existing web privacy policy, include that link. If you do not have one, you will need to develop one for this process. AgeOptions of Illinois has a [privacy policy here](#) that can guide you in creating your own.

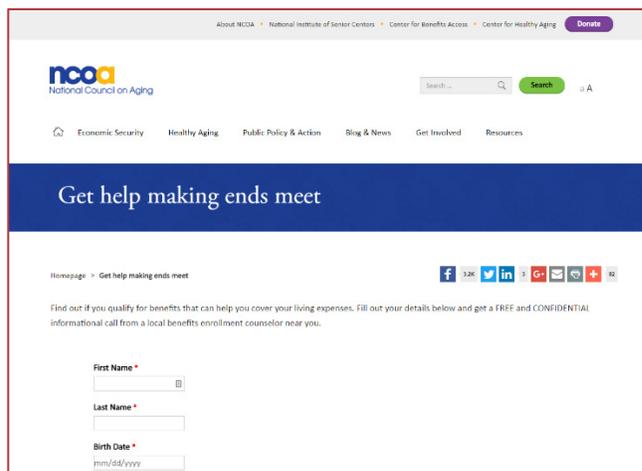
2. An online survey on your organization’s website

If you already have a form similar to [NCOA’s form](#) on your website, you can drive your Facebook ad traffic to that URL. This method is more complicated because it requires additional setup to be able to track results.

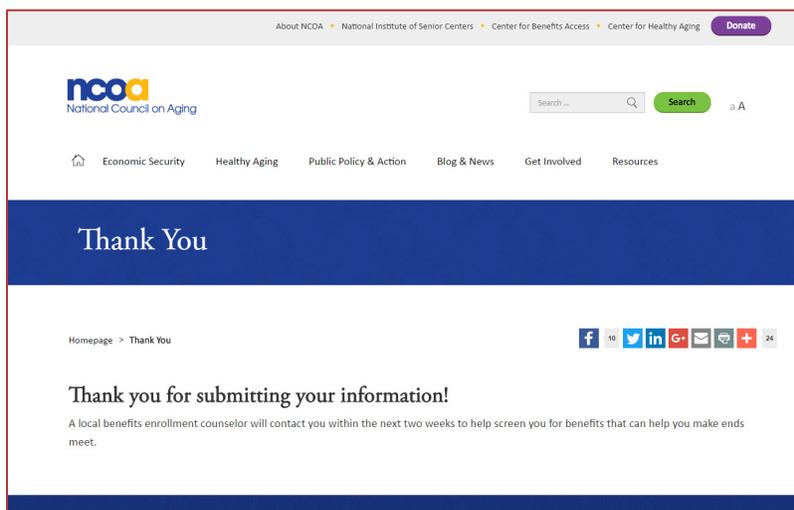
Your web developer or manager will need to place a small snippet of code, called **the Facebook pixel**, on the page the user lands on after they complete the survey. This code lets Facebook know when someone has completed the form, which in turn helps Facebook optimize how and when your ads are seen to be more successful. More information on the pixel setup is included in the Implementation section of this guide.



Example of Facebook ad linking to an organization webpage



NCOA landing page with survey with Facebook pixel installed (<https://www.ncoa.org/get-help-making-ends-meet>)



NCOA thank you page with Facebook pixel tracking lead conversions

3. Online survey on a third-party website

If you do not have a form to use on your organization's website, you can use a third-party service to create a landing page that can be embedded into your website. Tracking the ad performance via the Facebook pixel is recommended for this method to work well. Options for these services include:

- **Google Forms**: Google Forms are easy to build and use for data collection. Note: For data security, we recommend setting up two-step authentication with the Google account used to create the form. One of NCOA's Benefits Enrollment Centers in Tennessee has experience using this method. If you are interested in pursuing this as an option, you can get in touch with John Orzechowski (jorzechowski@tnjustice.org) or Brandy Bauer (brandy.bauer@ncoa.org).
- **SurveyMonkey**: SurveyMonkey's Gold package (\$25/month) will ensure you can collect unlimited survey responses and export your data into Microsoft Excel.
- **WuFoo form**: Pricing for WuFoo forms varies based on how much data you'll collect and ranges from \$14.95 to \$69.95/month.

Setting Up Your Facebook Ad Campaign

Getting started

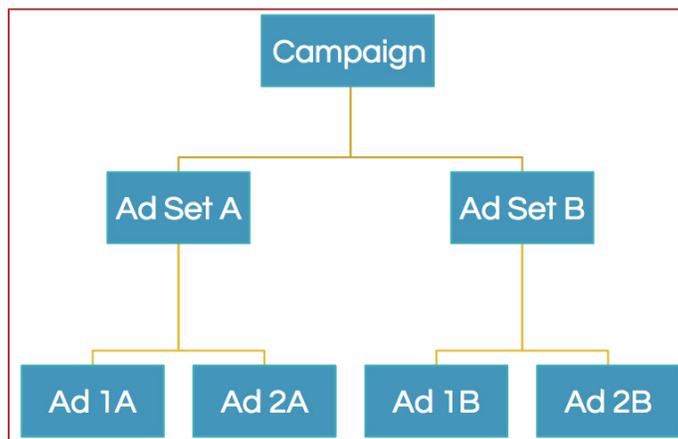
In order to run ads, you'll need to be connected to a Facebook page. We recommend managing your Facebook page and your Facebook ads through [Facebook Business Manager](#).

Once you're set up with Facebook Business Manager, you'll need a Facebook ad account. (Learn how to set up your [Ad Account here](#).) You'll also need to have payment information accessible.

After setting up an ad account, you can start running campaigns using [Ads Manager](#) or [Power Editor](#).

Structure of Facebook ads

Within your ad account, there are three levels where you specify your Facebook ad settings. At the Campaign level, you will set the advertising objective, which will determine how Facebook optimizes and measures your goal. Under the Campaigns are Ad Sets, which is where the ad budget, schedule, audience, and placements are defined. Within Ad Sets are the ads themselves, which just contain the creative elements (text and image).



Facebook ad hierarchy

We recommend creating 3-4 different versions of the ad to show to an audience. Facebook will run all the ads and then optimize the ones that are working best (based on the objectives you set at the Campaign level).

Setting up your campaign

When you set up your ads, Facebook will ask you to select an ad campaign objective. We recommend using these two types of campaign objectives, depending on where your organization is hosting the ad survey form.

- **For ads that collect survey information directly within Facebook**, choose the “Lead Generation” campaign objective with one ad set per audience. Here are two Facebook resources that explain more: [Overview of Lead Ads](#) & [Learn More About Lead Ads](#).
- **If you are using your organization’s own website or a third-party data collection form**, choose the “Conversions” campaign, also with one ad set per audience. Find instructions for how to set up a [Conversion campaign here](#). Keep in mind that with this objective, you’ll need to set up a Facebook pixel on the page that follows the survey so that Facebook can track how many people complete the survey. Get information on [setting up the Facebook pixel here](#).

Building your ads

We recommend the following selections when walking through the Facebook ad builder.

- **Choose your audience:** Here, you’ll define the demographics of your target audience. Consider who you want to see the ad – and who do you not want to see the ad – when selecting these options. For example, you may select:
 - Age:** 60-65+
 - Gender:** All
 - Detailed Targeting:** none
 - Connections:** none
- **Locations:** Targeting specific zip codes is recommended. You can manually enter zip codes in the Location section or click on “Add Bulk Locations” to paste in a list of zip codes.
- **Custom audiences:** The best use for custom audiences is for suppressions. You can suppress a list of people (example: emails of people you’ve served who are already enrolled in benefits programs) so that ads won’t be directed to people already connected to your organization. There are several other targeting options available but the best practice for audience size is allowing ads to go to the largest possible audience in your coverage area to start.

- **Placement:** The only platform and placement we recommend are in Facebook feeds (desktop and mobile). More details on [Placements here](#).
- **Budget:** Setting your Facebook ad budget can take some guesswork in the beginning. For comparison, you may wish to examine a table featuring pilot campaign sites, their audience size, and their various costs per lead and per acquisition in the Appendix. Then you can use your initial results to increase or decrease your spending. Factors that go into budgeting include:

The screenshot displays the Facebook Ads Manager interface. The 'Budget & Schedule' section shows a Lifetime Budget of \$2500.00, with an 'Adjust Budget' button. Below this, it indicates 'Up to \$2500.00, including \$1175.11 you've spent so far.' and 'Graph not available'. The 'Schedule Start' is set for Monday, Jun 5, 2017, at 1:39pm Eastern Time. The 'Schedule End' is set for Jun 30, 2017, at 11:59PM Eastern Time. Under 'Ad Scheduling', the option 'Run ads all the time' is selected. The 'Audience' section shows 'NEW AUDIENCE' and 'Custom Audiences'. The 'Audience Definition' section on the right shows a gauge between 'Specific' and 'Broad', with 'Your audience is defined.' and 'Potential Reach: 120,000 people'. Below this, 'Estimated Daily Results' are shown: Reach of 1,400 - 6,500 (of 84,000) and Conversions of 10 - 36 (of 280). A warning message states: 'Your results are likely to differ from estimates. We have limited data available to calculate this estimate, so estimates may be less accurate. The accuracy of estimates is based on factors like past campaign data, the budget you entered and market data. Numbers are provided to give you an idea of performance for your budget, but are only estimates and don't guarantee results. Were these estimates helpful?'

- Audience size: Your audience should not be fewer than 20,000 people or larger than 1 million. You can view your estimated audience size in the top right of the ad settings, as shown in the image above.
- Audience quality: If the audience is highly likely to take the survey, the cost of the ads will be cheaper. There's no magic way to determine audience quality, but following the best practices laid out in this guide will help mirror what was successful for other sites.

We recommend starting with the idea that the initial CPL will be \$10 each. From there, you can calculate a budget for how many leads you want to generate. Over time, you'll be able to calculate your own CPL and adjust budget projections accordingly. Once you know your own CPL, be sure to set a budget that provides a solid number of leads you can follow up with in a timely manner!

Incorporating the survey form

If you are using **Facebook Lead Ads** to collect information from people who click on your ad, you will need to set up a Lead Form. You can do this either before creating your ads or as you create them. You should set up your ad as a single image.

When prompted to create the form, turn off the Welcome Screen for your form.* Then, include these questions:

- Email
- First name
- Last name
- Phone number
- Zip code
- Date of birth
- Note: The available formats also do not allow you to ask a question with multiple responses, so you cannot create a question on current benefits program enrollment.

*Pilot campaign testing did not use a Welcome Screen for the Lead Ads. However, you may wish to test this feature as it can provide more details about benefits programs and process (i.e., explaining that after filling out the survey, a representative will call them in X-Y days based on staff capacity) and increase the quality of leads.

For the Thank You screen on the lead form, it will ask you to link through to your organization's webpage. We recommend linking to a services page on your website rather than the homepage, so any interested users can see which programs and services your organization provides.

If you are using a form on your organization's or a third-party website, set up your ad as a single image, drawing on the ad imagery and text below.

Ad Creative

Facebook ads include several components, as shown in the illustration.

The illustration shows a Facebook ad for the National Council on Aging (NCOA). The ad is a sponsored post. The components are labeled as follows:

- Your Facebook Page:** Points to the NCOA logo and name at the top left.
- Text:** Points to the headline text: "Living on a fixed income? You may qualify for benefits to help."
- Image:** Points to the main image showing a smiling woman in a grocery store.
- Headline:** Points to the text "Free Survey: See If You Qualify".
- News feed link description:** Points to the text "This post is brought to you by the National Council on Aging, a 65-year old nonprofit advocating for seniors across the country."
- Call to action button:** Points to the green button that says "FIND YOUR BENEFITS >".
- Display link:** Points to the text "BENEFITSCHECKUP.ORG" and the "Learn More" button.

As you select the images and text that will appear in your ads, keep in mind the best practices outlined here.

Ad text

Shorter text at the top of your ad often performs best. You may want to mention a specific financial value of benefits, for example, "Seniors can receive an average of \$108/month in help paying for groceries." You may also want to run ads mentioning a variety of programs like, "You may qualify for benefits that help pay for Medicare premiums, food costs, electric bills, and more."

Research with low-income older adults has revealed that using language around "fixed income" resonates with those who may be eligible for benefits. For example, your ad text may read, "Living on a fixed income? You may qualify for benefits that can help."

Be aware that there are character limits for Facebook ad text, as well as headlines and link descriptions. We have created [a helpful template](#) that you can use to check your sample text and ensure it does not exceed these limits.

Imagery

The recommended size for your image is 1,200 x 628 pixels and a minimum of 560 x 292 pixels. The image should contain little or no overlaid text. If more than 20% of the image features text, Facebook will penalize the ad by showing it less often and increasing costs. You can use Facebook's [text overlay tool](#) to see if you have too much text on your image. You can

overlay a call to action button on the image to encourage people to click on the ad, for example, “Find Your Benefits.”

Photos featuring people who represent your target audience—versus generic photos of money, Medicare cards, etc.—and who are making eye contact with the camera perform well overall.

If you do not have photos that your organization has taken or is authorized to use, there are numerous free and paid stock photo sites to obtain images.

Headline

The headline is the biggest thing (besides your ad’s image) your audience sees. It should include a call to action, for example, “See If You Qualify.”

News feed link description

This should give more information about where the user will be headed after clicking through the ad. Consider using a brief description of your organization and its logo to assure your audience the ad is from a reputable agency and not a scam.

Display link

This should be a shortened URL of your website, for example, “ncoa.org.”

Launching Your Campaign

Once you have developed your ad, set up your campaign and ad sets, and assembled your survey form, and have readied your staff to do follow up, you are ready for launch.

We recommend doing a one-day trial launch of your ads to ensure everything is working correctly, the leads are coming from the correct region, your staff has the capacity to follow up, etc. This initial run can also help you better determine your site’s goal for lead volume.

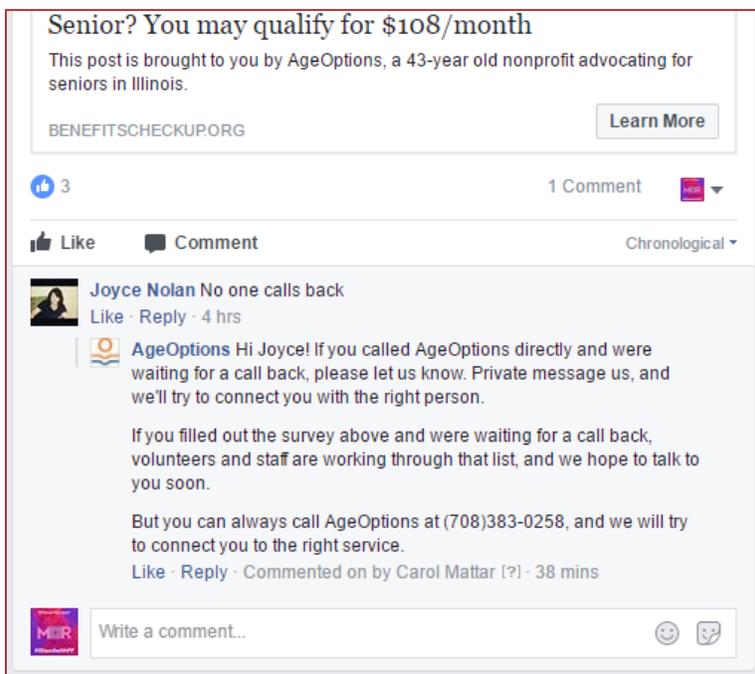
Monitoring

Keeping an eye on your ads and working to optimize them regularly is key to a successful ad campaign. Once your ads go live, set a calendar invite to remind yourself to check on the ad performance twice a week in Facebook’s Ads Manager. Learn more about using Facebook’s reporting tools to understand your data [here](#).

As you look regularly, you can confirm your leads are coming from the correct region and you can identify and pause low performing ads. Use the pilot site data in the appendix as a benchmark for your ad performance. Are your costs in line with those of sites serving areas

similar to yours? Are there any ads not doing as well as others? Are your staff able to keep up with responding to the leads? (If it's been more than 4 days, pause the ads to keep costs low.) Are there any comments on the ads you need to reply to?

It's valuable to engage with users on Facebook who have questions or concerns – it's one of the benefits of social media! Replying to ads is not necessary but helps establish trust with other users who may view the ad and have similar questions.



Example of a comment and response from AgeOptions

Optimization

How can you make your ads even better? Reviewing the data—that is, which ads generate the most clicks and qualified leads—on a monthly basis can help you assess ways to tweak the ad and improve your campaign. Consider what might resonate well with the audience you are targeting; is there a particular benefit that is popular in your area?

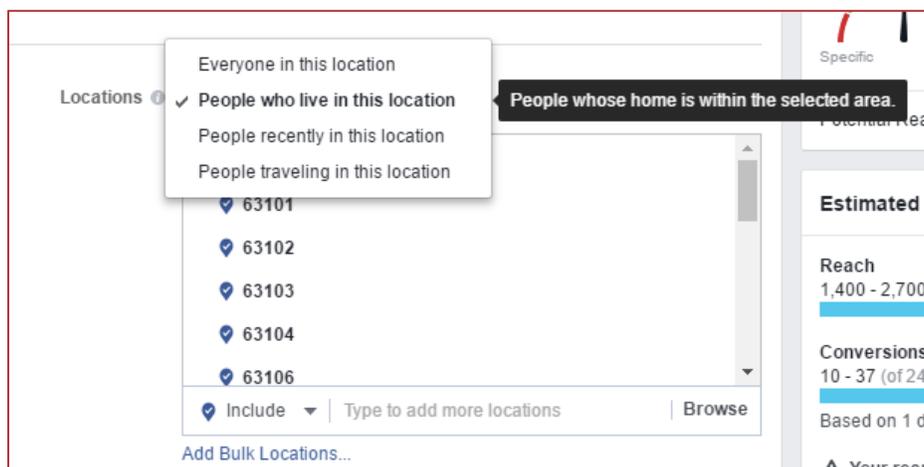
Reporting

What will success look like for you? What exactly is a low performing ad vs a high performing ad? Your primary metric for success will be low cost per lead (CPL) and then ultimately a low cost per qualified lead/acquisition (CPA). If one of your ads has a high CPL, low level of spend, low click-through rate, or low conversion rate (that is, the people who fill out the form are not qualified for benefits), it is underperforming. You can pause it and focus your campaign effort and budget on the higher performing ads. We have developed a [template reporting spreadsheet](#) that you can use to visualize the success of your Facebook ads and compare CPLs.

Frequently Asked Questions

We're getting leads outside of our service area. What do we do?

Facebook ad targeting isn't perfect, so you may see a few leads here and there that are outside your service area. This sometimes happens when people share the ads on their newsfeed, so their friends that are out of the area could be submitting the form. When this happens, you will still want to provide a response to these leads. Reach out to NCOA at centerforbenefits@ncoa.org and we'll be happy to provide you with draft language and contacts for where to send people to receive assistance applying for benefits in their area. If this is a frequent issue, you can also change your settings to only show ads to users that live in your target area. You can do this in the ad set settings, as shown below:



Help! We're getting way too many leads and our staff can't keep up.

If it's taking more than a few days from the time you receive leads to the first phone call back, you should decrease your daily budget on Facebook so your ads are reaching fewer people. The ads shouldn't be generating so many leads that they are overwhelming your staff. The ideal volume will allow staff time to follow up within a few days after leads come in.

We're having trouble getting people to answer our phone calls.

This is to be expected – people often don't pick up a call on the first try. You should try varying the times your staff makes calls (evenings or weekends if possible, otherwise different times throughout the day). The case manager can also try emailing the leads first, introducing themselves, and giving leads a heads up they will be calling, and then following up with a phone call.

Appendix A: Sample High Performing Ad

During a pilot campaign that tested varying Facebook ads in six different geographic areas, this ad was consistently the highest performing ad across the sites.

As you plan your Facebook ad campaign, you may want to use this message and a similar image to start.

National Council on Aging
Sponsored · ✪

Living on a fixed income? You may qualify for benefits to help.

ncoa
National Council on Aging

FIND YOUR BENEFITS >

Free Survey: See If You Qualify
This post is brought to you by the National Council on Aging, a 65-year old nonprofit advocating for seniors across the country.

BENEFITSCHECKUP.ORG

Learn More

Appendix B: Pilot Site Benchmarks

NCOA worked with the marketing firm M+R and six Benefits Enrollment Centers across the country to test Facebook ads in various settings. Below are the results of their efforts, which can be used to benchmark your own costs and successes.

Site	Audience Size	Average Monthly Spend	Reach	CPM	CTR	Average Leads/Day	Average CPL (initial leads)	CPA
AgeOptions (IL)	320,000	\$600	22,836	\$34.78	4.39%	8	\$3.62	\$54.31
LiveOn (NYC)	260,000	\$7,600	142,089	\$38.92	1.92%	18	\$18.88	\$119.96
ELM (MI)	260,000	\$350	20,357	\$26.02	5.15%	6	\$2.42	\$28.16
LabLaw (KY)	160,000	\$1,000	27,926	\$28.22	3.79%	10	\$4.76	\$19.37
SARPC (AL)	90,000	\$5,800	81,545	\$38.30	2.16%	15	\$16.33	\$111.68
MAAAA (MO)	49,000	\$1,000	14,383	\$31.00	3.03%	7	\$7.14	\$26.34
MAAAA STL (St Louis)	49,000	\$1,000	11,806	\$36.87	2.68%	6	\$8.47	\$51.11

**This CPA is estimated based on the proportion of Qualified Leads to Closed Cases for sites that do not yet have full Qualified Lead data*

Definitions:

Audience Size: Potential reach of the Facebook audience for each site

Average Monthly Spend: Average ad spend per month, excluding fees

Reach: Number of unique users that saw an ad

CPM: Cost per 1,000 Impressions; calculated by dividing Spend by Impressions and multiplying by 1,000

Impression: A showing of our ad to a user including multiple showings to the same user

CTR: Click-through rate; calculated by dividing Clicks by Impressions

Average Leads Per Day: Average number of daily leads

Average CPL (Initial Leads): Cost per Initial Lead; calculated by dividing number of initial leads by ad spend

Initial Lead: Lead submitted through the NCOA BEC form that the BEC site has not yet followed up with

CPA*: Cost Per Qualified Lead; calculated by dividing number of qualified leads by ad spend

Qualified Lead: An initial lead that qualifies for at least one benefit

**Due to delays in qualified lead reporting, an estimated ad spend proportional to the CPL was used to calculate this CPA*