

MOSHE ENGELBERG, Ph.D., M.P.H.

ResearchWorks, Inc.
12396 World Trade Drive, Suite 313
San Diego, CA 92128

Phone: (858) 487-8200
Fax: (858) 487-8264
Email: moshe@researchworks.com

Summary of Qualifications

- Established and lead successful entrepreneurial management & marketing consulting firm since 1991
- Fourteen years teaching and training diverse groups - from senior executives to graduate students
- Extensive academic training, with Ph.D. from Stanford University, and two Masters degrees
- Proven grantsmanship - over \$4 million - and ability to increase revenues for new and existing ventures
- Track record of creating unique research models, tools and methodologies that achieve practical results
- Substantial network of entrepreneurs, non-profits and government agencies

Education

Ph.D. Stanford University, Communication, 1994
M.P.H. San Diego State University, Health Promotion, 1986
M.A. University for Humanistic Studies, Counseling Psychology, 1984
B.A. University of California, San Diego, Psychology, 1983

Professional Experience

President, *ResearchWorks, Inc. San Diego, CA*

5/91 - Current

- Established and lead high-end marketing consulting firm that has helped scores of socially minded organizations advance their mission and improve their bottom line. Specialize in research-based marketing strategy, brand identity and positioning, and communication campaigns.
- Achieved and managed rapid growth in size and prestige of client base, which includes AARP, CDC, Scripps Clinic, Kaiser Permanente, Stanford University, CETYS University (Mexico), March of Dimes, United States Marine Corps, KPBS, Welch Allyn, and numerous others.
- Created and implemented many innovative programs and products, including *Seminars by the Sea™* for developing higher education marketing plans, *Power Analysis™* marketing research methodology, and *Positioning Touchstone™* system for building organizational identity and brand strategy.

Adjunct Professor & Lecturer, *SDSU, Graduate School of Public Health*

8/04 - Current

- Design and teach graduate courses in Health Communication Campaigns and specialized seminars including Social Marketing, Prevention & Control of Chronic Diseases and Entertainment, Media, & Health Promotion. Courses involve hands-on group projects that benefit numerous community agencies. Provide advising to students and collaborate with faculty on grant proposals.

Instructor & Adjunct Professor, *SDSU/USD/CSUSM/UCSD*

8/94 - Current

- Designed and taught numerous marketing and communication courses for graduate students, mid-career professionals and senior executives at all four major San Diego universities. Conferred Best Instructor Award in first year of teaching at SDSU.

Doctoral Fellow, *Stanford University, Institute for Communication Research*

9/88 - 12/93

- Awarded full fellowship. Developed research program in processes and effects of health campaigns, with focus on using entertainment as a vehicle for persuasion.
- Achieved proficiency in applied communication and marketing theory, many quantitative and qualitative research methodologies, many statistical packages, and varied computer applications.

Health Promotion Specialist, *Healthwise, Inc., Boise, ID**12/86 - 8/88*

- Conducted sales and marketing campaigns for award-winning health promotion programs.
- Provided consultation and training for health professionals nationwide in health promotion program implementation and marketing.
- Served as project manager for consumer education component of managed care program in partnership with large insurer. Developed and implemented scores of worksite seminars.

Counselor and Research Associate***Kaiser Permanente, Preventive Medicine Dept., San Diego****4/85 - 12/86*

- Initiated, designed, and executed department-wide marketing research studies leading to major programmatic, marketing, and bottom-line improvements.
- Facilitated groups in behavioral smoking cessation programs.

Prior research and field experience (1981 - 1986):

- Sharp HealthCare, Office of Public Affairs, San Diego, CA, Marketing Assistant
- North County Health Services, San Diego, CA, Community Health Educator
- UCSD Medical Center, San Diego, CA, Research Assistant
- Los Niños Education Center, San Diego, CA, Assistant Teacher

University Teaching**SDSU, Graduate School of Public Health, Lecturer & Adjunct Professor** *1/94 - Current*

Design and teach marketing and communication courses for graduate students and mid-career public health professionals. Supervise six group projects with community agencies each semester. Advise students.

UCSD, Healthcare Executive Leadership Program, Instructor*9/95 - 6/02*

Designed and taught Healthcare Marketing component of UCSD's Executive Education program for physicians, administrators, pharmaceutical executives, and allied health professionals.

CSUSM, College of Business Administration, Instructor*8/96 - 12/96*

Designed and taught new Executive MBA marketing course in New Product Introduction for healthcare administrators, physicians, and allied health professionals.

USD, School of Business Administration, Instructor*1/95 - 6/95*

Designed and taught graduate MBA course in Marketing Research. Supervised marketing research studies for San Diego Zoo & Wild Animal Park, Excalibur Technologies, Tripat Laboratories, Karl Strauss Breweries, PCSI, and Intuit.

Summary of Courses Taught:

- ◆ Healthcare Marketing
- ◆ New Product Introduction
- ◆ Marketing Research
- ◆ Health Communication Campaigns
- ◆ Prevention & Control of Chronic Diseases
- ◆ Social Marketing
- ◆ Evaluation of Health Services
- ◆ Advanced Seminar in Marketing & Communication
- ◆ Entertainment, Media, & Health Promotion

Publications

BOOKS

Engelberg, M. & Topor, R. (1995). *Master Marketing Plan Builder: How to Create a Successful Marketing Plan for Higher Education*. Educational Catalyst Publications, 235 pp.

BOOK CHAPTERS

Engelberg, M. & Kinsey, D. (forthcoming). A unique methodology for organizational development, campaign positioning, and message development. In *Formative Research*, D. Glick & M. Prelip (eds.), Jossey Bass.

Engelberg, M, Elder, J Guadalupe, A., & Campbell, N. (forthcoming). Designing, tailoring, & positioning health communications for the Latino community: The case of cancer prevention and nutrition. In *Formative Research*, D. Glick & M. Prelip (eds.), Jossey Bass.

Ayala, G.X., Ibarra, L., Arredondo, E., Horton, L., Hernandez, E., Parada, H., Slymen, D., Rock, C., Engelberg, M., Elder, J.P. (in press). Promoting healthy eating by strengthening family relations: Design and implementation of the *Entre Familia: Reflejos de Salud* intervention. In R. Elk & H. Landrine (Eds.), *Cancer Disparities: Causes and Evidence-Based Solutions*. Springer.

JOURNAL ARTICLES IN PROGRESS

Engelberg, M. (to be submitted to *Stanford Social Innovation Review*). Finding your Soul: A Practical Guide for Socially Minded Organizations.

Elder, J., Engelberg, M., Shaffer, R., Hurtado, S. (in progress). Battle plan approach for reducing heavy drinking in the U.S. Marine Corps.

JOURNAL ARTICLES (peer reviewed)

Peddecord, M., Jacobson, I., Engelberg, M., Kwizera, L., Macias, V., Gustafson, K. (forthcoming, 2008). Can movie theater advertisements promote health behaviors? Evaluation of a flu vaccination pilot campaign. *Journal of Health Communication*.

Elder, J.P., Ayala, G.X., Campbell, N.R., Arredondo, E.M., Slymen, D.J., Baquero, B. Zive, M. Ganiats, T.G., & Engelberg, M. (2006). Long-term Effects of a Communication Intervention for Spanish-Dominant Latinas. *American Journal of Preventive Medicine*, Vol. 31, No. 2, 159-166.

Lewis, E., Mayer, J.A., Slymen, D., Belch, G., Engelberg, M., Walker, K., Kwon, H., and Elder, J. (2005) Disseminating a sun safety program to zoological parks: The effects of tailoring. *Health Psychology*. 24: 456-462.

Elder, J., Ayala, G., Campbell, N., Slyman, D., Lopez-Madurga, E., Engelberg, M., Baquero, B. (2005). Interpersonal and print nutrition communication for a Spanish-dominant Latino population: Secretos de la Buena Vida. *Health Psychology*, Vol. 24, No. 1, 49-57.

Ayala, G., Elder, J., Campbell, N., Slyman, D., Roy, N., Engelberg, M., Ganiats, T. (2004) Correlates of Body Mass Index and Waist-to-Hip Ratio Among Mexican Women in the United States: Implications for Intervention Development. *Women's Health Issues*, Vol. 14, No. 5, 155-164.

Ayala, G., Elder, J., Campbell, N., Engelberg, M., Olson, S., Moreno, C., & Serrano, V. (2001) Nutrition Communication for a Latino Community: Formative Research Foundations. *Family and Community Health: The Journal of Health Promotion and Maintenance*, Vol. 24, No. 3, 72-87.

Fyock, J., Koepke, C., Meitl, J., Sutton, S., Thompson, L., Engelberg, M. (2001) Beneficiary Decisionmaking: The Impact of Labeling Health Plan Choices. *Health Care Financing Review*, Vol. 23, No.1, 63-75.

Engelberg, M. & Kirby, S. (2001) Identity Building in Social Marketing. *Social Marketing Quarterly*, Vol. VII, No. 2, 8-15.

Engelberg, M. (2001). What Makes You Unique & Valuable: Building a Strong Identity. *Social Marketing Quarterly*.

Mayer, JA, Lewis, EC, Eckhardt, L, Slymen, D, Belch, G, Elder, J, Engelberg, M, Eichenfield, L, Busic, A, Nichols, T, Walker, K, Kwon, H, Talosig, M, & Gearen, C. (2001). Promoting sun safety among zoo visitors. *Preventive Medicine*, 33, 162-169.

Talosig MA, Mayer JA, Eckhardt L, Clapp Lewis E, Kwon H, Belch GE, Eichenfield, LF, Elder JP, and Engelberg M. (2000). A National Survey of Sun Safety Activities at U.S. Zoos. *Journal of Community Health*, 25, 331-342.

Engelberg, M., Flora, J.A., & Nass, C.I. (1995). AIDS knowledge: Effects of channel involvement and interpersonal communication. *Health Communication*, 7, 73-92.

Engelberg, M., Pierson, R., & Kashio, H. (1992). Applying conjoint analysis to social advertisements. In John Sherry, and Brian Sternthal, (Eds.), *Advances in Consumer Research*. Provo, UT: Association for Consumer Research, Vol. 19, 696-705.

Stieg, P. & Engelberg, M. (1991). Worksite health promotion for state government employees. *American Journal of Public Health*, 81, 801-802.

Dockter, B., Black, R., Hovell, M., Engelberg, M., Amick, T., Neimier, D., & Sheets, N. (1988). Families and intensive care nurses: Comparison of perceptions of satisfaction. *Patient Education and Counseling*, 12, 29-36.

Engelberg, M., Elder, J.P., & Molgaard, C. (1987). Procuring incentives for community health promotion programs. *Journal of Community Health*, 12, 56-65.

TECHNICAL RESEARCH REPORTS (data-based, selected of 72)

New Product Medical Device Research & Development Project, Technical Report #10-2006. For Welch Allyn.

Campaign Research & Development Project, Technical Report #2-2007. For San Francisco AIDS Foundation.

Organizational Branding & Identity-Building Project, Technical Report #5-2006. For Kidsave International.

Communication & Identity-Building Project, Technical Report #4-2006. For Healthy Eating Active Communities.

Assessing Community Impact Feasibility Project, Technical Report #3-2005. For United Way of San Diego County.

Patient Market Analysis Study, Technical Report #6-2004. For Tri-City Medical Center, Vista CA.

Physical Activity Marketing & Branding Project, Technical Report #2-2004. For Center for Physical Activity, California Department of Health.

Medicare & Consumer Choices Exploratory Study, Technical Report #8-2003. For Centers for Medicare & Medicaid Services (CMS).

Adult ADHD Catalog to Improve Quality of Life, Technical Report #5-2003. For NCI SBIR.

Organizational Image & Positioning Study. Technical Report #4-2003. For Vista Hill Foundation, San Diego.

Medicare Image & Identity Project, Technical Report #2-2003. For Centers for Medicare & Medicaid Services (CMS).

Chronic Disease Communications Research & Development, Technical Report #5-2002. For Centers for Disease Control & Prevention (CDC).

Hispanic Physical Activity & Immunization Research Project: Phase 2, Technical Report #9-2001. For AARP, Washington, DC.

Hispanic Physical Activity & Immunization Research Project: Phase 1, Technical Report #5-2001. For AARP, Washington, DC.

Long Term Care Research and Strategy Project: Phase Two. Technical Report #4-2001. For AARP, Washington, DC.

Medicare Modernization Research Study, Technical Report #3-2001A. For Healthcare Financing Administration (HCFA).

SIMTEEN Lifestyle Computer Game Feasibility Assessment, Technical Report #3-2001B. For NCI SBIR.

Long Term Care Research and Strategy Project: Phase One. Technical Report #1-2001. For AARP, Washington, DC.

Organizational Identity Evaluation System. Technical Report #12-2000. For Alliance Healthcare Foundation, San Diego.

Marketing Wellness to Diverse Markets Research Study. Technical Report #3-2000. For AARP, Washington, DC.

Wellness Initiative Identity & Positioning Study. Technical Report #10-1999A. For AARP, Washington, DC.

Organizational Identity-Building & Positioning Project, Technical Report #10-1999B. For Centers for Disease Control & Prevention (CDC).

SB697 Community Needs Assessment. Technical Report #7-1999. For Anaheim Memorial Medical Center.

Organizational Identity-Building Leadership Workshop Report, Technical Report #2-1999. For Centers for Disease Control & Prevention (CDC).

Organizational Identity Communications Assessment. Technical Report #10-1998. For Alliance Healthcare Foundation, San Diego.

Alliance Consulting Group Feasibility Study. Technical Report #7-1998. For Alliance Healthcare Foundation, San Diego.

U.S. Marine Corps Binge Drinking Reduction Research Study & Battle Plan, Technical Report #6-1998. For U.S. Marine Corps & Naval Health Research Center (NHRC).

San Diego Needle Exchange Public Opinion Poll. Technical Report #11-1996. For Alliance Healthcare Foundation, San Diego.

Patient Satisfaction & Motivation Health Behavior Study. Technical Report #6-1995. For Kaiser Permanente Department of Preventive Medicine, San Diego.

PROFESSIONAL ARTICLES

Engelberg, M. (2005). All About Us: The Classic Physician Marketing Blunder. *San Diego Physician*, June, p. 25.

Engelberg, M. (2005). Greatness & Your Organizational Soul: Find It, Live It, Profit. *San Diego Physician*, July, p. 18.

Engelberg, M. (2005). Marketing 101: If you can't fix it, feature it! *San Diego Physician*, August, p. 16.

Engelberg, M. (2002). PR Firm: Counsel Thyself: Think about Your Own Brand, Not Just Your Clients'. *PR Week*. May 20.

Engelberg M. (2002). Building brand identity. *Government Executive*, December, p. 82.

Engelberg, M. (2002). Brand Identity A Critical Asset in Higher Education. *San Diego Business Journal*. May 5.

Engelberg, M. & Neubrand, S. (1997). Building sensible segmentation strategies in managed care settings. *Marketing Health Services*, Summer, 50-51.

Engelberg, M. with Lagorio, G. (1997). Developing segmentation strategies for new product/service decisions in managed care settings. *The Alliance Report*. Chicago, IL: The Alliance for Healthcare Strategy and Marketing, Vol. 2, January, 3-8.

Engelberg, M. (1997). Harnessing Technology for Better Healthcare Marketing. *The Alliance Report*. Chicago, IL: The Alliance for Healthcare Strategy and Marketing, July/August, 3-11.

Engelberg, M. & Topor, R. (1996). Building a successful healthcare marketing plan. *The Alliance Report*. Chicago, IL: The Alliance for Healthcare Strategy and Marketing, Vol. 1, January, 4-13.

Engelberg, M. & Topor, R. (1994). The advertising advantage: Ten steps to a research-based, results-oriented campaign. *Currents*. Washington, D.C.: Council for Advancement and Support of Education, Vol. 20, September, 12-17.

Engelberg, M. (1991). Great expectations: What to expect from your advertising or promotional campaign. *Marketing Higher Education* (Newsletter), 5, 1-4.

Communication Products

Faces of Medicare: Coping with Limited English Proficiency. Video: 8 minutes. Produced for CMS's National Medicare Education Program (NMEP). Awarded two film industry awards.

On Alcohol, Off Target: Binge Drinking Reduction in the U.S. Marines. Video: 17 minutes. Produced for Naval Health Research Center and U.S. Marines Corps Headquarters. Awarded two film industry awards.

SIMTEEN Lifestyle Computer Game (prototype). Produced for National Cancer Institute through Small Business Innovation Research grant.

ADHD Catalog: Products & Tips to Make Life Easier (prototype). Produced for National Institute of Mental Health through Small Business Innovation Research grant.

Grants

Project Secretos, 2000-2004, \$1,996,000

Co-Principal Investigator with Dr. John Elder, San Diego State University. Four year field experiment designed and tested the most cost effective approaches for marketing nutrition and cancer risk-reduction to the Hispanic community. Funded by National Cancer Institute.

Adult ADHD Catalog to Improve Quality of Life (SBIR Grant), 2002-2003, \$126,000

Principal Investigator. Conceived, created product prototype, and conducted proof of concept research for multi-purpose catalog/magazine of health information, products, and behavior change tips, for adults with ADHD symptomatology. Funded by National Institute of Mental Health Small Business Innovation Research Grant.

SIMTEEN Lifestyle Computer Game (SBIR Grant), 2000-2001, \$118,000

Principal Investigator. Conceived, created product prototype, and conducted proof of concept research for an entertainment-education simulation game to engage adolescents in cancer risk-reduction communications and behaviors. Funded by National Cancer Institute Small Business Innovation Research Grant.

U.S. Marine Corps Binge Drinking Reduction Intervention, 1997-98, \$320,000

Principal Investigator with Dr. John Elder, San Diego State University.
Funded by Headquarters U.S. Marine Corps, via Geo-Centers, Washington, D.C.

Soap Summit II Evaluation Project, 1996-97, \$(b) (4)

Principal investigator with Mr. Sonny Fox, Population Communications International.
Assessed impact of entertainment industry summit about soaps & population issues on participating soap opera writers, producers, network executives, and sponsors. Funded by the Ford Foundation

HIV Prevention Social Marketing Training & Technical Assistance Project, 1996-98, \$789,450

Principal Investigator, & subcontractor with San Diego Council of Community Clinics.

Funded by San Diego County Department of Health Services through CDC grant program.

Social Marketing Training & Technical Assistance Project, 1996-97, \$(b) (4)

Principal Investigator, with Dr. Margulies, Dean, CSU San Marcos, College of Business Administration.
Funded by Alliance Healthcare Foundation, San Diego

San Diego Clean Needle Exchange Public Opinion Poll, 1996, (b) (4)

Funded by Alliance Healthcare Foundation as part of harm reduction planning grant.

Doctoral Dissertation Grant, 1993, \$(b) (4)

Funded by American Cancer Society, California Division.

Senior Health Promotion Program Intervention, 1988-1990, \$118,000

San Diego State University subcontract to Healthwise, Inc.
Funded via federal Health Care Financing Agency's Prevention in Medicare Project.

Project Salsa, 1986-1991, \$(b) (4)

Co-Principal Investigator (in funded proposal) for Hispanic Nutrition Project, San Diego State University, Graduate School of Public Health, and San Ysidro Health Clinic. Funded by Kaiser Family Foundation Community Health Promotion Grants Program.

Associations

- Association for Consumer Research
- American Public Health Association
- Society for Healthcare Strategy and Market Development
- International Communication Association