Strategic Communication Planning for Success and Sustainability
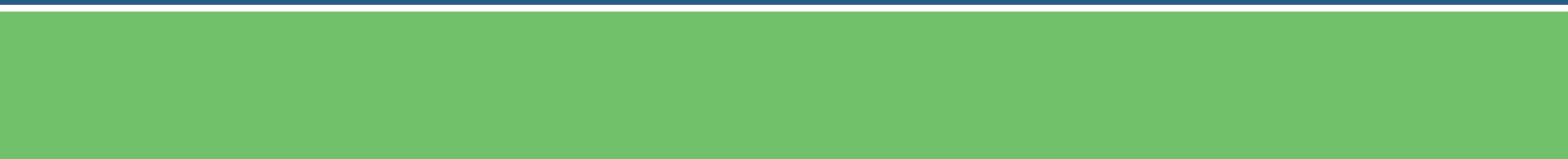
Strategic Communication Planning for Success and Sustainability

Contents

Welcome!

The National Resource Center for Mental Health Promotion and Youth Violence Prevention (National Resource Center) Communication Team believes that effective communication begins with a strong strategic plan, developed for your initiative in conjunction with your partners and stakeholders. Creating and relying on a well-considered plan provides a strategic roadmap for your communication activities. It also can be a critical component of your program's implementation and sustainability efforts.

Why Bother With Communication Planning?

As you look at implementing new programs and services, you may be exploring ways to get young children screened for behavioral health issues before they start kindergarten. You may want to enroll middle school students in your afterschool program. You may want to attract really good mentors for your mentoring program. All of these efforts will require communication.

Down the road, you will need to find a way to sustain your successful programs. You will need to reach out to community partners, such as community leaders, businesses, faith groups, early care and education (ECE) programs, schools, and other nonprofits. That will require communication as well.

Creating a communication plan presents you, your staff, and your partners with an opportunity to commit to your success as a team. It supports program implementation and paves the way for sustainability. Success and sustainability are like the two rails on a railroad track. Just as the train cannot run without both rails, getting to where you want to go requires communicating with both successful implementation and sustainability in mind.

Because your work life is filled with many responsibilities, it may seem that developing a communication plan will take too much time. But the time you spend up front in communication planning will yield rich results down the road. Your plan will help uncover ways to deepen existing partnerships and develop new ones that hold the potential to help implement, sustain, or even expand key functions of your initiative. Your plan will allow you to make the most of your limited time and resources.

When to Develop a Communication Plan

The National Resource Center Communication Team believes it is never too early or too late to think strategically about communication. We encourage you and your partners to engage in this process; we believe it can be an important tool to help your initiative leave a lasting footprint in your community.

If you are planning to use communication at the start of your initiative, it is quite probable you will focus on reaching those audiences you most want to engage in your programs and services—parents, ECE and school staff, community mental health professionals, pediatricians, and other audiences interested in preventing youth violence and promoting the overall well-being of children from birth to 18 years and their families.

If you and your partners created a communication plan at the start of your initiative, now is the perfect time to revisit that process, since you will be reaching out to new and different audiences to tell your story and generate support for the future.

If, instead, you and your partners have been using communication intermittently and tactically to promote your initiative—a press release submitted to your local paper announcing your initiative way back when; a brochure that describes your programs and services; a website that is updated occasionally—now is the perfect time to fold those tactics into a purposeful strategy.

> *Sustainability Tip:* If you are nearing the end of your initiative, to support sustainability, you may now find it necessary to communicate your successes to the audiences that can help sustain select functions when funding ends. Having a plan in place can help alleviate the stress many initiatives feel near the end of funding—stress that's often accompanied by the question, What on earth do we do now?

The 8-Step Communication Planning Model[1]

This workbook uses the 8-Step Communication Planning Model to provide a blueprint for planning. It is not a one-size-fits-all tool, but allows users to create site-specific, actionable communication plans. The model is based on the theory and practice of social marketing,[2] which adapts commercial marketing techniques to influence people to take recommended actions or make positive changes in their lives.

Action Plan

Strategy

1 Assess current situation

2 Set communication goals & objectives

3 Identify intended audiences

4 Develop & pretest messages

5 Select channels, activities, materials, & partnerships

6 Develop action plan

7 Develop & pretest materials

8 Implement, evaluate, & modify plan

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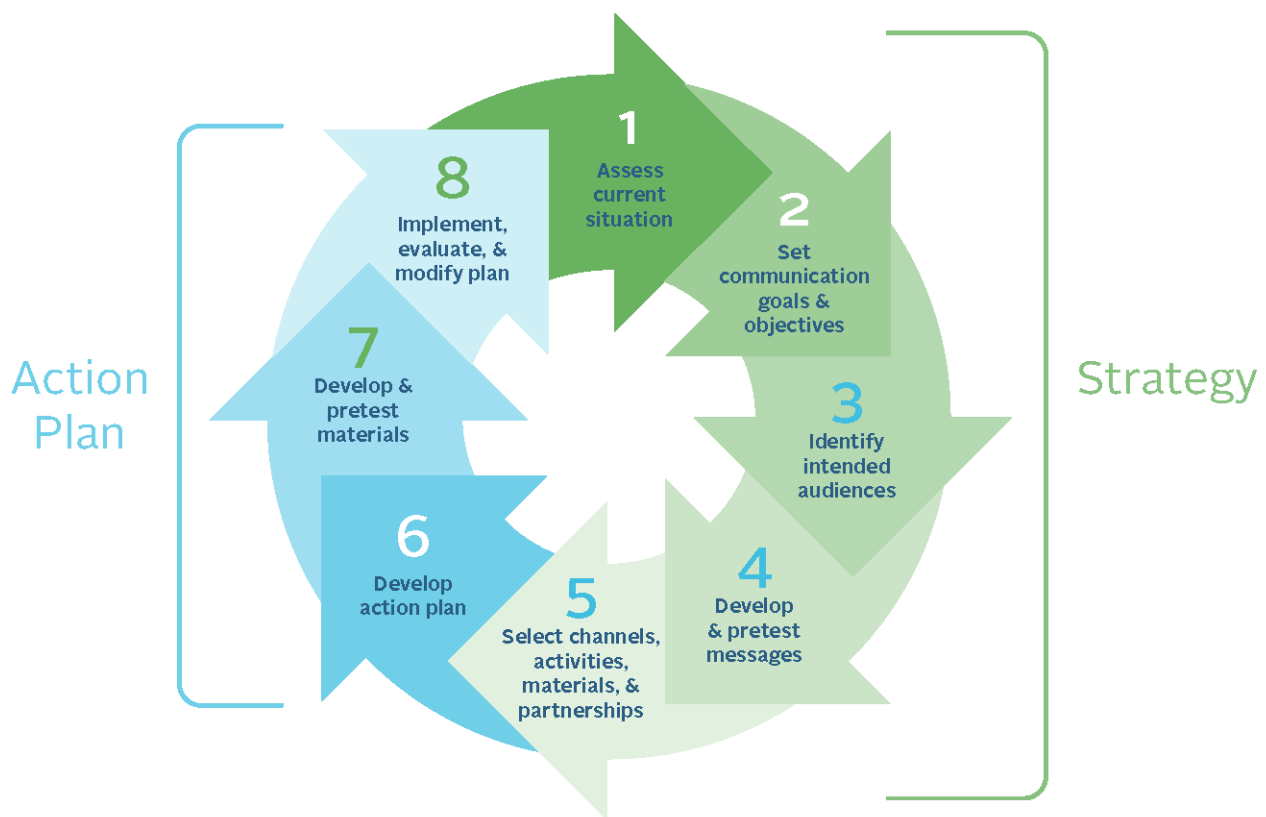
[1] Our planning model is based on the National Cancer Institute's *Making Health Communication Programs Work* (the "Pink Book"; 2001), with additional information drawn from Kotler, Roberto, and Lee's *Social Marketing: Improving the Quality of Life* (2002).

[2] Social marketing is the use of commercial marketing principles and techniques to influence an intended audience to voluntarily accept, reject, modify, or abandon a behavior for the benefit of individuals, groups, or society as a whole (Kotler, Roberto, and Lee, *Social Marketing: Improving the Quality of Life* 2002).

This model will help you:

- Step 1. Assess your current situation: Where are you now?
- Step 2. Set communication goals and objectives, making sure they are SMART.
- Step 3. Identify your intended audiences: Whom do you need to reach? Be specific and segmented.
- Step 4. Develop and pretest messages: What does each audience need to hear? Will they respond to the message?
- Step 5. Select channels, activities, materials, and partnerships: How will your messages be delivered? Who will deliver them?
- Step 6. Develop an action plan: Who is responsible for doing what when?
- Step 7. Develop and pretest materials: Will your intended audiences respond as intended to the materials you have developed?
- Step 8. Implement, evaluate, and modify your plan: It is a "living" plan and should be revised as needed.

The first five steps help you develop a strategy. The final three steps help you develop an action plan to put that strategy in place.

Using This Workbook

This workbook was designed as a resource to complement the National Resource Center's (NRC) three-part online learning modules in strategic communication planning available on the NRC's website [http://www.healthysafechildren.org/learning-module-series/communication-module-series]. It can also be used as a standalone planning tool.

This workbook provides guidance and worksheets for completing all steps of the 8-Step Model. The first five steps represent the strategic component of your plan. The workbook also helps you understand Steps 6, 7, and 8—the steps that put your strategy on its feet—and provides worksheets for carrying out each step. As you work through this process with your partners, you may want to photocopy the blank worksheets at the end of workbook to help your team brainstorm ideas.

> *Sustainability Tip:* Throughout this workbook, there are text boxes that provide additional content for those thinking about sustainability or even expanding key functions of their initiative.

STEP 1:

Assess Your Current Situation

STEP 2:

STEP 3:

STEP 4:

STEP 5:

STEP 6:

STEP 7:

STEP 8:

Step 1: Assess Your Current Situation

Purpose: To assess your program's current status in order to develop a realistic communication plan.

The first step in developing your communication plan is to realistically assess your current situation. Reflect on where you have been and where you are now. Why? Because you cannot figure out where you need to go if you do not know where you are starting.

First, Ask the Right Questions

Start by asking the right questions—questions that help you and your partners identify the strengths, weaknesses, opportunities, and threats (SWOT) facing your program. The answers will provide you with a strong "reality check" and will include both the hard truths as well as the intangibles surrounding your program.

The following table contains the types of questions you should consider as you work through this first step of the 8-Step Communication Planning Model.

Question	Yes	No	Working On It
Do people in your community and schools know about your program?			
Does the community generally have a positive impression of your program?			
Do other community partners need to be at the table or do you need to be at *their* table?			
Are you on track with program implementation?			
Does your program serve the number of people you set out to serve?			
Does your program serve culturally diverse populations?			
Is your program seeing the results you hoped for?			
Do you need to gather more data?			
Have you regularly been presenting results of your work?			
Have you had any successful events around your work?			
Have the media covered your program in a positive light?			
Do you have champions in your community or schools who help spread the word about your program?			
Have you identified potential funding sources in your community to support your program?"			

Sustainability TIP: If your program is thinking about sustainability, consider these additional questions.

Question	Yes	No	Working On It
Have you identified the key functions* of your program that should be sustained?			
Have you determined whether you will expand your program? What components?			
Are your partners committed to sustaining this work?			

* What do we mean by "functions?" Let's say you received funding to implement school-based mental health services, and now that your original funding is winding down, you still want to sustain that *function.* You may not be able to sustain the same jobs, and the way those services are delivered may look different, but the key is that you still want to sustain the function of providing school-based mental health services.

Then, Conduct a SWOT Analysis

After reflecting on your answers to the questions in the previous section, work with your staff and partners to complete the SWOT (strengths, weaknesses, opportunities, and threats) analysis below. Bear in mind that:

- **Strengths** are *internal* attributes of your program that can help to achieve your program's objectives.
- **Weaknesses** are *internal* attributes of your program that can hinder achieving program objectives.
- **Opportunities** are *external* conditions that can help to achieve program objectives.
- **Threats** are e*xternal* conditions that can hinder your program's performance.

You could spend days on an in-depth SWOT analysis, but it is possible to do it in an hour-long brainstorming session. Consider conducting this exercise during a meeting with your staff and community partners. To make the most of your time, you can divide participants into four groups, with each group filling in one of the areas. The small groups can then report back to the large group. The large group can suggest additional items to insert into the SWOT analysis.

Below is a worksheet with some example considerations for program implementation and/or sustainability that may be included in a SWOT analysis.

Strengths	Weaknesses
Implementation Examples: • Enthusiastic parents • Strong support from school board members **Sustainability Example:** • Strong team especially in early childhood	**Implementation Examples:** • Have not explained to teachers what to expect in classrooms • Have not yet explained to parents what behavioral wellness screening is **Sustainability Example:** • Have not shared our successes with stakeholders
Opportunities	**Threats**
Implemenation Examples: • Partnerships with county mental health programs can enhance efforts • Strong relationships with pediatricians in the area **Sustainability Example:** • Several highly engaged parents would be good champions to improve sustainability	**Implementation Example:** • New round of teacher layoffs anticipated **Sustainability Example:** • Budget cuts mean less money for sustaining services

The left side is labeled **Internal** (top) and **External** (bottom).

STEP 1:

STEP 2: Set Communication Goals & Objectives

STEP 3:

STEP 4:

STEP 5:

STEP 6:

STEP 7:

STEP 8:

Step 2: Set Communication Goals and Objectives

Purpose: To articulate measurable, short- and long-term communication goals and objectives for your program.

Effective communication can be crucial to the success of your efforts and to creating lasting systems change. Figuring out what you want to accomplish by setting strategic communication goals and objectives early on will help you get there. Both the communication goals and objectives should clearly articulate what you want to accomplish.

Understand the Relationship Between Communication Goals and Objectives

Communication goals and objectives serve two different but related purposes:

- *Communication goals* answer the questions, What do you want people to do that they are not already doing? What actions should they take? What behavior do you want to see change? Goals are desired long-term outcomes, and your communication goals should support your program's overarching goals.
- *Communication objectives* answer the question, What communication activities do you need to take to achieve your communication goal? Objectives are short-term, measurable steps toward a communication goal. Your objectives may include raising awareness of an issue, but to result in real change, they should emphasize convincing your audiences to take a specific action.

Set Communication Goals and Objectives

Set communication goals that:

- Engage audiences to take action on your behalf or change a behavior
- Are realistic
- Can be measured, so you will know when you have succeeded

Sustainability Tip: When considering sustainability, think about the questions you answered in the previous step as well as your SWOT analysis and your programmatic goals for sustainability. For instance, if a programmatic sustainability goal includes ensuring early childhood mental health professionals remain in pediatric care settings, then you will need to persuade others to help make this happen—and this persuasion is the basis for your communication goal.

Think about what you want to change. Perhaps you want:

- Bystanders to bullying to tell an adult
- Local places of worship to become long-term hosts to afterschool programs
- The local school board to adopt Positive Behavior Interventions and Supports (PBIS) in every school in the district
- Local area businesses to help fund a summer program for at-risk youth
- Parents to take their children for developmental and behavioral screening
- Health profressionals to refer children and their families to community-based services

These are the start of your communication goals. We will talk about making them measurable later in this step.

After you have developed your communication goals, think about what communication activities you need to take. These activities will help you define your communication objectives.

Example Communication Goal: Persuade parents of young children to have their child screened for behavioral wellness before kindergarten.

Potential Communication Objectives to Achieve this Goal: These potential communication objectives support the overarching goal of persuading parents of young children to have their child screened:

- Educate parents about behavioral wellness and reduce fears related to screening
- Persuade primary care providers, ECE programs, schools, or other venues to host screening events
- Promote scheduled screening events to parents

REMEMBER: Communication goals are not tactics!

Too often we make the mistake of thinking that a communication goal is to "create a brochure" or "send out a quarterly newsletter." Great ideas, perhaps, but they are *not* goals. These are tactics—actions that can help you achieve your goals. Tactics like these may or may not be helpful in your communication efforts, but at this stage of the planning process your focus should be on identifying and articulating what, ultimately, you want to accomplish.

We will take a look at more tactics in Step 5. For now, take a step back, think strategically, and create those *goals!*

Prioritize Your Efforts

Thinking about all you need to get done can be overwhelming. Once you start setting your communication goals and objectives, you may come up with a dozen goals and 10 objectives for each of them. We do not recommend tackling all this at once. Instead, think about *what needs to happen first*. Prioritize your efforts in order to stay strategic and sane during the process.

Look back to your program's logic model, implementation plan, sustainability plan, or even an existing communication plan to make sure these communication goals and objectives support these plans. If not, revise your communication goals so that they align with these existing plans.

To prioritize your goals and objectives make sure they are:

- Realistic and important to accomplish in the next 6 to 12 months
- Aligned with your program's logic model, implementation plan, and/or sustainability strategy
- Easy to accomplish (for example, the "low hanging fruit")

Make Your Communication Goals and Objectives SMART

Once you know what you want to accomplish and have prioritized these efforts, it is time to refine the communication goals and objectives so that they are SMART:

Simple	The goal or objective is clearly stated and easily understood.
Measurable	Quantitative or qualitative outcomes to measure achievement of the goal or objective are stated.
Attainable	The goal or objective is challenging but realistic.
Relevant	The goal or objective is linked to your audience's needs and priorities.
Timebound	A deadline for achieving the goal or objective is stated.

Let us look at how a draft goal and objectives can be sharpened by making them SMART.

Draft Communication Goal	SMART Communication Goal
Persuade parents of young children to have their child screened for behavioral wellness before kindergarten.	By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.
Draft Communication Objectives	**SMART Communication Objectives**
Educate parents about behavioral wellness and reduce fears related to screening.	By May of next school year, provide information about behavioral screening to all parents of entering kindergarteners.
Persuade primary care providers, ECE programs, schools, or other venues to host screening events.	By June of next school year, persuade six locations (including schools and health clinics) to host back-to-school behavioral screening events.
Promote scheduled screening events to parents.	By September of next school year, promote screening events to parents through schools, pediatricians, health clinics, ECE programs, and social media.

Set and Prioritize Your SMART Communication Goals

In the table below, list up to four SMART communication goals for your program. (Remember to consider your findings from Step 1 of the 8-Step Communication Planning Model.) Then, in the right-hand column below, prioritize your goals by ranking them from one to four. Your number one goal should be your highest priority.

SMART Communication Goals	Prioritize from 1 to 4
Example: *By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.*	*1*
Goal:	
Goal:	
Goal:	
Goal:	

Develop SMART Communication Objectives to Support Your Communication Goals

For each SMART communication goal you listed on the previous page, list below up to four SMART communication objectives that will help you reach the goal. Then prioritize your objectives for each goal by ranking them from one to four. Your number one objective should be your highest priority.

Remember you can find blank copies of these worksheets at the end of the workbook.

SMART Communication Goal #___:	
Related SMART Communication Objectives	**Prioritize from 1 to 4**
***Example:** By June of next school year, persuade six facilities (including ECE programs, schools, and health clinics) to host back-to-school behavioral screening events.*	
Objective:	
Objective:	
Objective:	
Objective:	

STEP 3:

Identify Intended
Audiences

Step 3: Identify Intended Audiences

Purpose: To identify audience segments for each communication objective and learn as much as possible about them.

Now that you have articulated your SMART communication goals and objectives, it is time to identify the specific audiences you need to reach.

Identifying your intended audiences is often fairly straightforward, but you cannot stop there. You also need to determine what you know about your audiences and how you can learn more. What are their values, needs, beliefs, and priorities? You need to answer these questions in order to create messages and materials that resonate with your audiences and persuade them to take action.

To do this, you need to set aside assumptions about your audiences and conduct a little research. In addition to understanding their values, needs, and beliefs, you need to gather some practical information such as:

> *Sustainability Tip:* It is time to make a list of who else needs to be at the table to support your sustainability goals. Bear in mind, the audiences you chose to reach early in your initiative may or may not be the audiences you most need to reach now. For example, you may have spent your first year or two focused entirely on engaging parents, students, and teachers. You may still want to keep parents as a key intended audience for sustainability, but now you may want to focus on adding community partners, policymakers, and district leadership to your communication efforts—those audiences with the capacity to directly support your sustainability efforts.

- Where and how can your audiences be reached? Coalition meetings? Events associated with their faith community? Online? Public forums like city council meetings?
- What sources of information do your audiences trust? Their peers? The media? Do they trust hard data? What about anecdotal stories?
- How do your audiences like to receive information? Via social media? E-mail? In person? Broadcast or print news?

Gathering the answers to these questions can make your communication strategy a success.

First, let us dig a little deeper into your audiences.

Segment Your Intended Audiences

Let us consider the SMART goal example from Step 2: *By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.* Based on the objectives in that example, it is safe to say that one of your intended audiences will include parents of children entering kindergarten.

The communication challenge, however, is that not all parents experience parenting in the same ways. Some parents are raising children alone and working two jobs to pay the rent, while others are not. It should be clear that the needs, values, and beliefs of these two groups of parents are likely to be different, and that means they may not be persuaded by the same message.

This is the reason that marketers regularly *segment* their audiences in order to craft messages and materials that are specifically tailored to different groups. Segmenting audiences is a critical step—and one that is often overlooked. But how should you segment your audiences for your goals and objectives?

This simple fill-in-the-blank phrase can help:

"We need to reach   [audience]   who already   [knows, is, or does something] "
Looking again at our earlier goal, you could complete the phrase above to read:

"We need to reach   parents   who already   have had their child immunized. "

Thinking about other audiences you might need to reach for our example goal, other statements could include:

- We need to reach *pediatricians* who already *are involved with child wellness initiatives in the community.*

- We need to reach *elementary school principals* who already *want all students to be healthy and safe.*

Primary and Secondary Intended Audience Segments

Building again on the SMART example from Step 2, your goal is to persuade parents to take a very concrete action—get their child screened for behavioral wellness. In this example, parents—or, more specifically, parents who have already had their child immunized—are what we call a "primary audience segment."

Pediatricians, however, would be a "secondary audience segment." Secondary audiences are generally *influencers;* they are trusted by your primary audience segment and have the ability to help persuade your primary audience to take an action.

Prioritize Your Intended Audience Segments

Let us say your **communication goal is "To obtain support from 20 businesses for afterschool programs before the start of the school year."** You know that local businesses are concerned about delinquent behavior in the hours that follow the school day, and you can illustrate the benefits of keeping youth occupied with positive programs in the hours before parents get home from work. Your intended audience clearly would be local business leaders, but not all local business leaders will share the same level of interest in supporting your initiative.

You can segment this audience in a number of ways to target them more effectively:

- We need to reach businesses that already *employ high school students after school or during the summer.*
- We need to reach businesses that are already *in close proximity to our school campuses and may be most directly affected by the elimination of afterschool programs.*
- We need to reach business leaders who have already demonstrated an interest in investing in our community's children, particularly around the issues of education and health.
- We need to reach business leaders who are already *active in our Chamber of Commerce's community services committee*.
- We need to reach business leaders who already *have children enrolled in our schools*.

You may now find that, instead of communicating to local business as one large audience, you really need to communicate to five *segments* of your local business community. This may seem as though your work has increased, but it really has not. You need to prioritize your intended audience segments and focus your efforts. Prioritizing audience segments does not mean you will not eventually reach all of your intended segments; it means you are making the most of your time and resources.

To prioritize audience segments, consider the following:

- Which audience segments are most likely to provide the engagement or support your program is seeking?
- Which segments' missions most closely resemble your program's mission?
- Which segments need to be reached first?

Now, What Do You Know About Your Audience Segments?

Once you have identified and prioritized your intended audience segments, learn as much as you can about their missions, values, beliefs, and goals. What sources of information do they trust? Are they aware of your initiative's work, and do they support it? Which parts of your communication goals for sustainability align with their concerns? What is the best way to reach them?

It is impossible to know too much about your intended audiences. All your findings will assist you in determining which stories they want to hear and in creating messages and materials that are more likely to persuade them to take the desired action.

Some types of questions to ask your audience segments include:

- Do you know/care about [your issue]?
- Would you be willing to [action requested]?
- What would prevent you from doing this?
- What would make it easier to do this?
- How do you like to receive information?
- Where do you like to receive information?
- What kinds of data do you want to hear?
- What kinds of stories do you want to hear

With all you have already learned about your intended audience, you will have an easier time assessing which kind(s) of message and data delivery methods will work best. No matter which audience segment you have set out to reach, you will have more success if the information is:

- Easy to understand *for them*
- Relevant and timely *to them*
- Aesthetically appealing *to them*
- Delivered by a source that is trustworthy *to them*

Audience Profile Worksheet

In the top section of the worksheet below, fill in one priority communication objective from the worksheets you completed for Step 2. Below that, in the "Intended Audience Segments" column, list two intended audiences that your program needs to reach to achieve this objective. In the column to the right, make note of what you know to be true about each audience segment, as well as what you still need to learn. Make as many copies of this worksheet as you need for your priority communication objectives.

Communication Objective:	
Intended Audience Segments	**What Do You Know About This Audience Segment?** **What Do You Need to Learn?**
You can describe an audience segment by saying, "We need to reach _____ *[audience]___* who already _____ *[is, knows, or does something]___*."	What are each audience segment's needs, beliefs, values, and priorities? What do you still need to learn about each audience segment?
1.	
2.	

STEP 1:

STEP 2:

STEP 3:

STEP 4:

Develop and
Pretest Messages

STEP 5:

STEP 6:

STEP 7:

STEP 8:

Step 4: Develop and Pretest Messages

Purpose: To develop effective messages that resonate with your intended audiences and motivate them to think, feel, or act in ways that support your communication goals.

Messages can be *informative* (that is, they convey new facts to raise awareness) or *persuasive* (that is, they change attitudes or behavior or persuade someone to take action). Some messages are both. Your messages will become the underlying themes that are highlighted in your program's activities, presentations, and materials and in any other methods you use to reach your audiences.

Effective messages:

- Convey how your program is relevant to the audience's beliefs and values
- Demonstrate the urgency of your program by relating it to the audience's core concerns
- Put a "face" on your program or issue
- Motivate your intended audience to think, feel, or act
- Use language that is as free of technical, scientific, and bureaucratic jargon as possible
- Make sense to your intended audience or audience segment

> *Sustainability Tip:* An overarching message that runs through all your materials might be that supporting your initiative's sustainability efforts is an *investment* in your community. The concept of investment could resonate with several different audience segments, all of whom are affected by tight budgets and limited resources.

Developing messages that resonate deeply with your audience segments can be challenging. It helps to remember that it is not what we *want* the audience to hear, it is what they are *able* to hear. The challenge is crafting simple and jargon-free messages that "humanize" your issues and tap into the feelings of your audience.

Remember, a message is not a catchy hook, slogan, tagline, or a mission statement. All these things are related tools for helping identify where you want your program to go. But the kind of messages you are going to develop and pretest in your communication plan are messages that educate, raise awareness, and persuade others to take action. A values-based message can help you accomplish this.

Craft a Values-Based Message

There are four steps to crafting values-based messages:

A. Frame *your* messages with *your audience's* values.
B. Outline the benefits of your solution.
C. Address and overcome any potential barriers your audience might have.
D. Recommend a specific, realistic call to action.

A. Frame Your Messages[3]

A message *frame* is like a filter that helps your audience makes sense of the world. When you *provide* that frame for your audiences, you can influence the way your audience feels about your issue.

Think about this salient example of message framing: Cable news networks may report the same information, but it is frequently framed so differently from network to network that it is hard to believe it is the same story.

Message frames are based in values, beliefs, and priorities. In the case of the cable news networks, they each attract an audience that shares core values. Their audiences tune in precisely *because* of those shared values.

By framing your messages in your audience's values, you can significantly improve the likelihood that your audience will truly hear you, because it will illustrate that you and your audience share common hopes for your community and its future.

To craft a values-based message frame, consider how your audience might answer this question: What kind of world do we want to live in?

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[3] Adapted from findings from Frameworks Institute, http://www.frameworksinstitute.org

Look at the table below for a small sample of the kinds of values that might be most important to your audience. As you consider what value to choose for your message frame, remember that your answer should be indisputably true *for your audience*. It should represent the big dream that *they* hold dear.

What kind of world do we want to live in? A community that is …				
Thoughtful	Caring	Safe	Honest	Just
Diverse	Healthy	Respectful	Creative	Successful
Responsible	Fair	Optimistic	Wise	Hopeful
Equitable	Realistic	Educated	Family focused	Authentic

By crafting a values-based frame for your messages, you establish immediate consensus with audiences, even those who may not believe in prevention, thus increasing the chances that the rest of your message will be well received. Use the table below to add what your audience segments and wider community care about.

What kind of world do we want to live in? A world that is …				

B. Outline Your Benefits

Your audiences will want to understand how your programs or services will benefit *them*, and it helps to be able to clearly define this in terms that will make sense *to them*. When considering how your initiative benefits your audiences, it helps to ask whether you are able to solve a problem for them.

If your organization is working to develop afterschool programs, to anyone already involved it may seem as though the greatest benefit comes from helping youth. However, this might not be true for potential partners.

- A single mom with an at-risk teen will care that her child has a safe place to go until she can get home from work.
- A local business might genuinely appreciate the free promotion you can give it with signage at your events and mentions in your newsletters and on your website.
- The juvenile justice system may have more court cases than it can easily handle and would be able to lighten its load by partnering with you to find alternative solutions to juvenile offenses.
- Mental health service providers might benefit from the increased client base that could come from partnering with you.

C. Overcome Their Barriers

Your audience will probably have reservations about what you are offering in your message, and these reservations, or barriers, need to be overcome before your audience will say yes. Audiences may feel that you are asking something that seems too expensive or too time consuming. It may not seem realistic or meaningful to them. This is your opportunity to explain that what you are asking them to do is *easy*.

For the afterschool program example we discussed earlier, some barriers may be:

- Parents: Are you telling me I am a bad parent? Stay out of my family's business.
- Businesses: We need to focus on increasing our revenues, not on helping schools.
- Law enforcement: Prevention is not our job. We respond to crime.
- Mental health service providers: Our focus is not on schools, it is on our clients.

As you develop the message components that outline your benefits and overcome potential barriers, do not forget to review the findings about your audience you captured in Step 3—it will help you keep your focus on your audience's needs, wants, and preferences as you craft language. Providing data and telling powerful stories can be good strategies to use when outlining benefits and overcoming potential barriers. Data and stories can help express benefits in a meaningful way and can help to counter-balance potential barrier.

D. Recommend a Call to Action

Now that you have delivered a compelling and customized message, what would you like your audience to do next? Remember that a great call to action does not have to move the whole mountain at once. If your audience has never heard of your program before, a call to action that requests a donation of goods or services may not be as realistic as a request for a follow-up meeting to discuss your solution in greater detail.

Here is a list of common calls to action that may help guide your thinking:

- Take your next phone call.
- Write a letter/pick up the telephone on your behalf.
- Introduce you to someone else.
- Invite you to speak in front of another group.
- Serve on an advisory board.
- Come to a meeting.
- Provide services to clients.
- Provide funding for sustainability.
- Change a behavior.

It is time for you to craft your own message components with the worksheet on page 37.

Developing Messages Worksheet

In the top section of the worksheet below, fill in a communication objective (from Step 2) and an intended audience segment (from Step 3). Then craft a simple message for each of the message components in the left-hand column. Remember, blank copies of the worksheet are in the end of the workbook.

Communication Objective:
Example: By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.

Intended Audience Segment:
Example: Parents who have already had their child immunized.

Values-Based Message Frame What statement will link your efforts to your audience's core values?	*Example: We want to ensure our children enter school ready to learn and able to succeed.*
Outline the Benefits How will your audience benefit from what you are asking? Can you solve a problem for them?	*Example: The screening does not take a lot of time and can be a part of a regular visit to your pediatrician.*
Overcome Barriers How will you convince your audience that it is easy to say yes to your request?	*Example: Ask your pediatrician about scheduling a behavioral health screening.*
Call to Action What specific steps do you want your audience to take?	

The four message components you have just developed will serve as the foundation of your message to your audience. Depending on the way you need to deliver your message (the next step), you will be able to integrate these message components in different ways into your materials and through your delivery channels.

Check the message you developed in the worksheet against this checklist:

- Is it stated positively?
- Is it framed in the values that this audience is likely to hold?
- Does it outline benefits that would be of interest to this audience?
- Does it describe how the program would overcome the audience's potential barriers?
- Does it include a realistic call to action?

A Final Word about Messages: Pretest

Even the most carefully crafted messages will not be effective if they do not resonate with your intended audience. Before moving forward to develop materials or activities, we urge you to pretest your messages with your intended audiences to determine whether the messages are persuasive. Ask a few members of your intended audience for input. If you find that a particular message does not have the effect you envisioned, use this feedback to adjust your message *before* you create materials. This extra step could save a great deal of time and money in the long run.

Some questions to ask:

- Does it make sense?
- Does it inspire action?
- How could it be improved?

Pretesting methods are discussed in greater detail in Step 7 of this workbook.

STEP 1:

STEP 2:

STEP 3:

STEP 4:

STEP 5: Select Channels, Activities, & Materials

STEP 6:

STEP 7:

STEP 8:

Step 5: Select Channels, Activities, and Materials

Purpose: To identify the most appropriate avenues for delivering your messages to your intended audiences.

Determining the most effective ways to reach your intended audiences means going back to the work you did in Step 3. Refresh your memory:

- What sources of information do they trust?
- Who or what might compel them to take the desired action on your behalf?
- How would they prefer to get your information?
- How and where do your intended audiences spend time? To what civic associations, faith-based groups, or other organizations do they belong?
- How often and in what ways will they need to hear the message?

Answers to these kinds of questions will help you deliver your messages effectively, but there are other considerations as well. You need to determine how you can ensure that your communication will be:

- Appropriate for your goals and intended audiences
- Delivered to your intended audiences in a timely manner
- Aligned with your budget and resources
- Tailored to your intended audiences' overall perceptions about youth violence prevention and support services

> ***Sustainability Tip:*** As you think about sharing messages to support sustainability, remember that many of your audiences will need to hear how you have succeeded in addressing your issues. In other words, you need to tell the human story of success and share data that demonstrate progress that is worth supporting. Both of these elements are important. Why? Because stories move us to action, and data tell us what action to take. When coupled together and presented in ways that meet your audiences' needs, you are far more likely to get the response you are looking for.

This step guides you to select the channels, activities, and materials you will use to deliver your message. Below are just a few examples that may be relevant to your communication plan for sustainability and can help stimulate discussion with your partners.

Channels

A communication channel is just that—a path through which a message is delivered. Communication channels can generally be classified as people, places, and things. Here are examples of communication channels in each of these categories.

People	**Places**	**Things**
• Peers	• School	• Website
• Trusted authorities	• Hair salon	• Social media
	• Library	• TV
	• Place of worship	• Radio
	• Supermarket	• Newspapers
	• Doctor's office	• Magazines
	• Laundromat	• E-mail

Activities, Events, and Materials

Activities and materials are the tactics and tools used to send messages through the channels. Some possible examples include:

Activities and Events	**Materials**
One-on-one meetings	Fact sheets
News conferences	News releases
Community events	PowerPoint presentations
Conferences	Websites
Public testimony	Public service announcements/videos
Presentations to groups	Reports
Award ceremonies	Community report cards
Family days	Posters, flyers, and brochures
Red Ribbon Week	Bookmarks
Open houses	Other branded promotional items

For activities, think about where you will find your audiences; where do they live, learn, work, and play? For materials, think about which are the best ways to reach them. No matter how you deliver your message, your audience's preferences should serve as your guide.

Frequency and Mix

No commercial product or service has ever placed one ad in a magazine and assumed it would be the only marketing they would ever have to do. Instead, products are marketed commercially in many ways, over time. You can apply this same principal of frequency and mix to your own strategy.

To better conceptualize frequency and mix, imagine a young child asking her parents for a new toy. That little girl would never ask *just once* for the toy—she would ask repeatedly, and she would get increasingly creative with *how* she asked her parents. She might ask her mother in the morning, draw a picture of the new toy and put it on the refrigerator in the afternoon, and finish the day by getting her other siblings to ask their dad while he is relaxing after dinner. Parents might cringe at the thought of this, but you have to applaud the persistence and ingenuity of these young marketers who are often successful.

> *Sustainability Tip:* Partners and stakeholders are far more likely to support your sustainability efforts if they have received regular updates from you and your staff and hear about your successes, rather than hearing about your initiative sporadically or not at all.

The same principle applies to your initiative. Think about the number of times (frequency) and how (mix) you will get your messages out there.

Planning Channels, Activities, and Materials Worksheet

In the top section of the worksheet below, fill in one intended audience segment and one message from Step 4. In the middle column below, identify channels, activities and events, and materials for delivering the message to the audience segment. In the right-hand column, note the frequency for sharing the message via the given channel, activity or event, or material.

Intended Audience Segment:

Example: Families of low income and at-risk youth

Message:

Delivery Methods	Description (Mix)	How Often? (Frequency)
Channels	*Example: Program's and partners' Facebook pages; faith-based leaders*	
Activities and Events	*Example: Information booths*	
Materials	*Example: Flyer for students to take home, posters at laundromats*	

STEP 1:

STEP 2:

STEP 3:

STEP 4:

STEP 5:

STEP 6:   Develop An Action Plan

STEP 7:

STEP 8:

Step 6: Develop An Action Plan

Purpose: To determine where, when, and how each task in your communication plan will be carried out.

This step makes sure that all the hard work you have done to craft a strategy in Steps 1–5 sees the light of day. A great action plan makes the best use of everyone's limited time and resources. It is good project management, and every project director knows how important that is. The action plan will answer:

- Where do you start?
- Who will do what?
- When does it need to happen?
- How much will it cost?

As you know, a strategy without a plan is only a piece of paper with good ideas on it. In Step 6, it is time to turn your strategy into an action plan. Your action plan can be as simple or as complex as your needs require, but at a minimum, it should have the following essential information:

- A listing of major activities, tasks, and subtasks
- The target date for completing each task
- The person responsible for ensuring that each task is completed

You can create the plan in Word, Excel, or any other software that works for you and your staff. On the next page is a description of one task in a simple action plan.

Example Communication Objective: Before budget planning sessions in June, gain support from the school board to finance additional school-based mental health counselors.

Task/Subtask	Target Date	Estimated Cost	Person Responsible	Status
Task: Deliver presentation to school board on progress.	5/16	Staff time + $50	Emily	
Subtask: Gather success stories from principals and teachers that demonstrate positive impacts (for example, fewer disciplinary referrals, calmer classrooms).	4/6	Staff time	Henry	Done
Subtask: Create PowerPoint presentation (10 slides) and fact sheet for the board.	4/28	Staff time	Henry, Keisha	Done
Subtask: Give draft presentation and fact sheet to superintendent to review.	4/29	Staff time	George	Done
Subtask: Make final edits to materials.	5/5	Staff time	Keisha	
Subtask: Print final materials.	5/10	$50	Keisha	
Subtask: Make presentation at school board meeting.	5/16	Staff time	Emily	

Communication Competency Worksheet

Your program's staff and partners have varying degrees of time and enthusiasm to devote to communication efforts. They also bring a range of skills and knowledge to support these efforts. Creating the right mix of staff and partners is crucial for implementing your communication action plan. Review the communication competentices in the table below to learn more about your staff members' and partners' strengths and weaknesses.

Involving your partners in your communication efforts has many benefits. Partners can:

- Leverage the talents and resources of additional individuals and groups
- Demonstrate and enhance community support for the issues your program addresses
- Improve trust, communication, and collaboration among community agencies and sectors

Use the worksheet on the next page to map out what competencies your program has—from basic to advanced—to support your communication activities.

Communication Competencies	Staff Possesses	Partners Possess	Do Not Have
Basic Skills and Knowledge			
Communication planning			
Interpersonal communication			
Writing			
Health literacy			
Cultural and linguistic competence			
Intermediate Skills and Knowledge			
Materials layout and design			
Website development and search engine optimization			
Video production and editing			
Copyediting			
Project management			
Media relations			
Social media			
Team/staff management			
Communication monitoring and measurement			
Advanced Skills and Knowledge			
Communication evaluation and research			
Focus groups moderation			
Service procurement			
Contract management			
Communication of risk to high-burden populations			
Crisis communication			
Cross-Cutting Skills and Knowledge			
Training design and delivery			
Serving as spokesperson			
Finding software expertise (everything from PowerPoint to Photoshop)			

After completing this checklist, think about:

- Does your team include people with prior experience in communication?
- Do staff skills align with the program's strategic approach?
- Have team roles been assigned relative to the size of the project? (Large programs typically need more team members working on communication.)
- Do you have partners who can help support communication activities?

Budget Communication Activities

Create a detailed communication budget before you begin producing materials or hosting events. Your costs will depend on several factors, such as where your program is located, when and where you host events, and how many copies of program materials you print.

Do not forget hidden costs that you might otherwise overlook. For example, if you are planning a summertime ribbon-cutting ceremony to celebrate your new community clinic, will you need to:

- Rent a public address system so speakers can be heard?
- Buy/borrow extension cords so the media have access to power?
- Provide water or other beverages, since the event will be outdoors?

Implement Your Communication Action Plan

One of the last steps in implementing your communication action plan is determining in what order and when activities will occur. There are several factors to consider:

- **Sequencing and Scheduling:** This is the order in which you implement communication activities. What needs to happen first, second, last? If you are asking pediatricians to give parents a flyer on the benefits of behavioral screening, when will you need to create and print the flyers? When will you need to meet with the pediatricians?
- **Timing:** Timing refers to scheduling activities in relation to events happening outside your program. To engage your intended audiences, you should ensure that your activities do not conflict with holidays, celebrations, school or university schedules, or important community or political events.
- **Synergy:** Synergy is about integrating related activities to achieve greater impact. You may want to consider connecting some of your communication activities with national or local health observances such as Red Ribbon Week, a substance abuse and violence prevention campaign observed every October.

Action Plan Worksheet

Below you will find a template for your action plan. In each row, list the primary task and subtasks, as well as costs, target dates, and person(s) responsible. Remember, blank copies are located at the end of the workbook.

Communication Objective:

Communication Activity Task/Subtask	Estimated Cost	Target Date	Person(s) Responsible
Task: **Subtasks:**			
Task: **Subtasks:**			
Task: **Subtasks:**			
Task: **Subtasks:**			

STEP 1:

STEP 2:

STEP 3:

STEP 4:

STEP 5:

STEP 6:

STEP 7: Develop and Pretest Materials

STEP 8:

Step 7: Develop and Pretest Materials

Purpose: To ensure that your materials resonate with your intended audiences before the materials are produced and used.

Now that you have an action plan and know what needs to be done, let us think about:

- What needs to be created?
- When should you adapt existing materials?
- Whose input do you need?
- How will you know if your materials resonate?

> ***Sustainability Tip:*** Look at the materials your initiative has already developed. Now is a great time to review and update them based on your experience. Remember, you may be able to adapt your own initiative's materials to help meet your sustainability communication goals and objectives.

Communication and social marketing professionals have learned many lessons over the years about what makes a communication program or social marketing campaign effective. One of the most important lessons is the critical importance of *pretesting messages and materials*. Having representative members of your intended audience review and comment on both messages and materials before they are produced or used is essential to the success of your communication.

If you are tempted to skip pretesting, think twice about the potential pitfalls. Remember, we may think we fully understand our intended audience, but we probably do not. Pretesting can save us from making costly mistakes.

Adapt Existing Materials or Develop New Ones?

Let us consider some benefits and drawbacks of creating new communication materials for your program or adapting existing materials.

	Benefits	Drawbacks
Adapting Existing Materials	• Messages may have been vetted and tested. • Materials may cost less to create, purchase, or produce.	• Materials may not be effective for your intended audiences. • Challenges may emerge related to attribution and cobranding.
Developing New Materials	• Development allows you to create customized, localized materials. • Your program can have full ownership of materials created.	• It takes more time and money to develop and pretest new materials.

To help determine if you should adapt existing materials or develop new ones, use this decision tree.
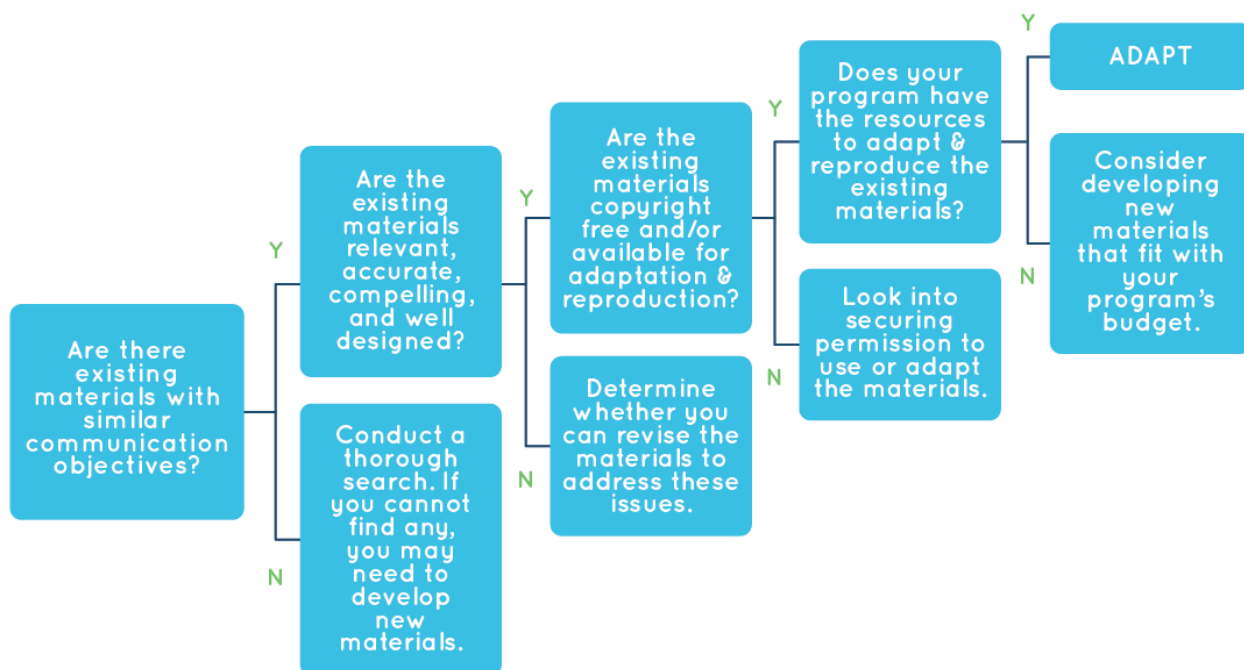
Pretest Messages and Materials

Pretesting your communication messages and materials is a critical step that should not be overlooked, even if you are adapting materials. Before you develop new materials, it is best to engage members of your audience segments so you understand their perspectives and what motivates them to take action.

Once you have draft materials or messages (or you are considering adapting existing materials), pretesting will help you determine whether they resonate with your audiences. For your pretest, share the draft materials or messages with audience members and ask them open-ended questions about their reactions. Be sure to use what you learn during pretesting to improve and refine your materials and messages.

Pretesting helps you:

- Identify whether your messages and materials have any major flaws
- Explore alternative messages and materials
- Fine-tune your messages and materials

Typically, developing communication materials is a four-step process:

1. Develop a prototype
2. Review and pretest
3. Revise and refine
4. Produce

Remember to test all parts of your messages and materials—the images, words, layout, colors, and more. If your intended audience does not understand or relate to your messages and materials, your program's time and resources will not have been well-spent.

Make sure you:

- Pretest your draft messages and materials with members of your audience segments.
- Ask open-ended questions about the messages/materials and their understandability, visual appeal, relevance, and cultural and linguistic appropriateness.
- Ask about any negative responses to the materials/messages and improvements needed.
- Use feedback from pretesting to revise your messages and materials.

Pretesting can be done fairly inexpensively and sometimes at no cost. You can pretest draft messages and materials through focus groups, conducting online or in-person surveys and interviews, and informally asking people in public settings for their feedback.

Remember: When creating your action plan, be sure to include time for pretesting.

Once you are confident that your materials are ready to go, you are ready to produce them and move to the last step in the communication planning process!

STEP 1:

STEP 2:

STEP 3:

STEP 4:

STEP 5:

STEP 6:

STEP 7:

STEP 8:

**Implement, Evaluate
& Modify the Action Plan**

Step 8: Implement, Evaluate, and Modify the Action Plan

Purpose: To determine if the plan is meeting your communication goals and, if not, to make appropriate and timely modifications to ensure success.

Managing a communication plan is an ongoing process. Implementing your strategies is only the beginning. Your communication plan should be a living document that is revised and fine-tuned over time.

To ensure that your communication efforts are effective and successful, you must specify how and when you will evaluate and, if necessary, modify your strategy and action plan. As you roll out your communication plan, we encourage you to create a feedback mechanism to monitor your success. If something in your program or campaign is not working, do not worry; it is okay to make the modifications necessary to get back on track.

To evaluate the effectiveness of your communication plan, this step asks you to:

- Assess how well your communication goals and objectives are being met
- Determine which messages are (and are not) resonating with your intended audiences
- Identify the channels, materials, activities, and partnerships that are (and are not) helping you to reach and engage your intended audiences
- Identify obstacles that you had not anticipated
- Identify any *new* intended audiences you had not recognized when starting this planning process
- Create and implement new strategies to reach your goals and objectives

Monitoring versus Evaluation

When planning for monitoring and evaluation, it is important to distinguish between what you will monitor and what you will evaluate.

- ***Monitoring*** tracks and measures progress toward achieving communication *objectives*. It often includes *process measures* such as how many people attended your event, followed you on Facebook this month, or answered your survey.
- ***Evaluation*** tracks progress toward achieving communication *goals* to assess your effectiveness in bringing about desired change in an intended audience. It includes *baseline data*, tracks changes in behaviors along the way, and ultimately reports *outcomes*.

Remember, the two are related, but they serve distinct purposes and look at different metrics or indicators.

Take a Fresh Look at Your SMART Communication Goals and Objectives

Let us return to the SMART communication goals and objectives you developed back in Step 2. The "m" in SMART stands for "measurable." When you created your SMART communication goals and objectives, you incorporated some metrics for tracking the success of your efforts.

Monitoring and evaluating your communication efforts not only will help you make well-informed adjustments to your approach, they will also help you determine whether your communication efforts helped drive the change you wanted to see.

Recall the example communication goal and objectives in Step 2:

- Our communication goal is to persuade 65 percent of parents of incoming kindergarteners to have their child screened for behavioral wellness by September of the coming school year.
- Our communication objectives focus on providing information to parents, persuading facilities to host behavioral screening events, and promoting the screening events to parents.

Let us consider ways you can evaluate and monitor progress for this goal and its objectives.

Evaluate Progress toward Achieving a Communication Goal

To evaluate something, we need to compare what was (baseline data) to what is (outcome data).

For baseline data in this example, it is important to know how many incoming kindergarteners were screened for behavioral wellness at the beginning of the previous school year. Was it 10 percent? Fifty percent? Having this baseline number makes it possible to measure progress.

You could also collect pretest and posttest survey data from parents to determine whether your program made a difference in (a) what parents of young children know about behavioral wellness screening, and (b) whether parents have actually had their children screened.

Your posttest survey, conducted after you have implemented communication activities, might include such questions as:

- In the past three to six months, have you heard any messages about screening children for behavioral wellness?
- If yes, where or from whom did you hear the messages?
- Did these messages influence you to have your children screened?

Collecting these kinds of baseline and outcome data can provide critical information that enables your program to fine-tune its approach. If you are working with a program evaluator, he or she may be able to help you with monitoring and evaluating your communication efforts.

Below is an example of the type of information you might collect for our example communication goal.

Communication Goal: By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.

Metric	Sample Baseline Data	Sample Outcome Data After Communication Activities Are Implemented
The percentage of incoming kindergarteners screened for behavioral wellness the previous school year	• The percentage of parents of incoming kindergarteners who have heard messages about screening children for behavioral wellness • The percentage of parents of incoming kindergarteners who intend to have their child screened for behavioral wellness	• The percentage of parents of incoming kindergarteners who have heard messages about screening children for behavioral wellness • The percentage of parents of incoming kindergarteners who had their child screened for behavioral wellness

Monitor Progress Toward Achieving Communication Objectives

Let us look at one of the communication objectives for our goal, as well as potential activities and metrics you could use to monitor your progress.

Communication Objective 1: By May of next school year, provide information about behavioral screening to all parents of entering kindergarteners.

To monitor progress for this objective, you will need to know how many parents of incoming kindergarteners you are trying to reach. Is it 50 or 500? You will also need to monitor progress in implementing your chosen activities

If… your outreach activities included:	Then… your monitoring metrics would include:
• Including flyer about behavioral screening in the registration packet sent to parents of incoming kindergarteners	• Number of flyers included in parent registration packets
• Giving flyers to local ECE programs to distribute to parents	• Number of flyers given to ECE programs
• Sending an e-mail message about behavioral wellness screening to parents of incoming kindergarteners	• Number of e-mails sent to parents
• Posting messages about behavioral wellness screening on the school district's Facebook page	• Number of behavioral screening posts on the district's Facebook page; number of shares and comments on each post
• Providing local pediatricians with flyers to share with parents	• Number of pediatricians contacted; number of flyers supplied to pediatricians

Embrace Midcourse Corrections

Your program's monitoring efforts may tell you that although your communication activities are on track, you are not seeing the results you hoped for. For example, even though you met with more than a dozen principals and preschool program directors, you were able to persuade only two of them to host a screening event, so you did not screen nearly as many incoming kindergarteners as you had projected. In this case, your program will need to make midcourse corrections, which is perfectly normal.

To begin to identify potential midcourse corrections, return to the worksheets you completed for Steps 3, 4, and 5 of the 8-Step Model for Communication Planning, and ask yourself these questions:

- Did we identify the right audiences? Perhaps you need to identify additional audiences.
- Do our messages reflect our audiences' values and priorities? Review your messages to determine whether you need to modify them. For example, it is possible that parents of incoming kindergarteners still do not believe that their child's behavioral wellness is a big issue. Or perhaps elementary school principals do not think it is appropriate for their school to host a behavioral wellness screening.
- Did we deliver our messages in the right way at the right time? If you are having trouble convincing preschool program directors and principals to host a screening event, perhaps for future meetings with members of this audience, you should invite someone who knows the principal or program director and who already values screening children for behavioral wellness.

If you make midcourse corrections to your communication approach, make sure you revise your action plan to reflect the changes.

Congratulations!

You have worked through each step of the 8-Step Model for Communication Planning. You have learned that the process is iterative with each step building upon the work of the previous step.

Notice that this model is depicted as a circle. There is no end to effective communication. Once you have seen success with one set of goals, you will discover you are ready for more. You will have identified new audiences with whom you will want to connect. You will have new programs you need to announce. You will have new partners at the table. You will have new successes that need to be conveyed to others to support sustainability.

By working through the exercises in this book, you have made a genuine commitment to the success of your initiative. You are now thinking strategically to:

- Make the most of your available resources and your realities
- Set realistic and actionable communication goals
- Identify the specific intended audience segments that are most likely to support your efforts
- Craft messages that resonate with those audiences
- Deliver those messages in ways that meet the needs and preferences of your audiences

In addition, you have recognized that the best plans are worth no more than the paper on which they are written unless they are implemented. Now, you are ready to:

- Make an action plan that assigns tasks and due dates
- Create, pretest, and produce any materials
- Implement, evaluate, and modify your plan

You can now carry this information and these skills into the work you do every day to make your community healthier and safer for children and their families.

APPENDIX

Resources for Health Communication & Social Marketing

Resources for Health Communication and Social Marketing

Online Courses

National Resource Center for Mental Health Promotion and Youth Violence Prevention's Communication Planning for Program Success and Sustainability:
http://www.healthysafechildren.org/learning-module-series/communication-module-series

Unite for Sight Health Communication Strategies Online Course:
http://www.uniteforsight.org/health-communication-course/module1

Weinrich Communications Social Marketing University Online:
http://www.social-marketing.com/webinars.html

Select Publications

The Community Guide's *What Works: Health Communication and Social Marketing*
http://www.thecommunityguide.org/about/What-Works-Health-Communication-factsheet-and-insert.pdf

National Cancer Institute's Pink Book *Making Health Communication Programs Work:*
http://www.cancer.gov/publications/health-communication/pink-book.pdf

Theories and Models in Communicating Health Messages:
http://www.corwin.com/upm-data/13975_Corcoran___Chapter_1.pdf

Journals

American Journal of Health Promotion: http://www.healthpromotionjournal.com

American Journal of Health Behavior: http://www.ajhb.org

Health Communication: http://www.tandfonline.com/toc/hhth20/current

Health Education Research: http://her.oupjournals.org

Journal of Health Communication: http://www.tandfonline.com/toc/uhcm20/current

Journal of Social Marketing: http://www.emeraldinsight.com/journal/jsocm

Social Marketing Quarterly: http://smq.sagepub.com

Additional Online Resources

CDC Health Comm Works:
http://www.cdc.gov/HealthCommWorks

CDC's Gateway to Health Communication & Social Marketing Practice:
http://www.cdc.gov/healthcommunication/healthbasics/whatishc.html

Healthypeople.gov Health Communication and Health Information Technology:
https://www.healthypeople.gov/2020/topics-objectives/topic/health-communication-and-health-information-technology

U.S. Department of Health & Human Services Office of Disease Prevention and Health Promotion:
http://health.gov/communication/resources/

The Guide to Community Preventive Services, Health Communication and Social Marketing:
http://www.thecommunityguide.org/healthcommunication/index.html

On Social Marketing and Social Change:
http://socialmarketing.blogs.com

Social Marketing Evidence Base:
http://www.psi.org/research/evidence/social-marketing-evidence-base/

APPENDIX

PLANNING WORKSHEETS

The following pages offer blank versions of all the planning worksheets found in this workbook.

We invite you to make as many copies as you like for yourself and your partners to use.

Step 1: Assess Your Current Situation

Ask the Right Questions Worksheet

Question	Yes	No	Working On It
Do people in your community and schools know about your program?			
Does the community generally have a positive impression of your program?			
Do other community partners need to be at the table or do you need to be at *their* table?			
Are you on track with program implementation?			
Does your program serve the number of people you set out to serve?			
Does your program serve culturally diverse populations?			
Is your program seeing the results you hoped for?			
Do you need to gather more data?			
Have you regularly been presenting results of your work?			
Have you had any successful events around your work?			
Have the media covered your program in a positive light?			
Do you have champions in your community or schools who help spread the word about your program?			
Have you identified potential funding sources in your community to support your program?			
Have you identified the key functions of your program that should be sustained?			
Have you determined whether you will expand your program? What components?			
Are your partners committed to sustaining this work?			
Other:			
Other:			
Other:			

SWOT Analysis Worksheet

	Strengths	Weaknesses
Internal considerations		
	Opportunities	**Threats**
External considerations		

Step 2: Set Communication Goals and Objectives

SMART Communication Goals Worksheet

In the table below, list up to four SMART communication goals for your program. (Remember to consider your findings from Step 1 of the 8-Step Communication Planning Model.) Then, in the right-hand column below, prioritize your goals by ranking them from one to four. Your number one goal should be your highest priority.

SMART Communication Goals	Prioritize from 1 to 4
Example: By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.	
Goal:	
Goal:	
Goal:	
Goal:	

SMART Communication Objectives Worksheet

For each SMART communication goal you listed on the previous page, list below up to four SMART communication objectives that will help you reach the goal. Then prioritize your objectives for each goal by ranking them from one to four.

SMART Communication Goal #____:	
Goal:	
Related SMART Communication Objectives	**Prioritize from 1 to 4**
Example: By June of next school year, persuade six facilities (including ECE programs, schools and health clinics) to host back-to-school behavioral screening events.	
Objective:	
Objective:	
Objective:	
Objective:	

Step 3: Identify Intended Audiences

Audience Profile Worksheet

In the top section of the worksheet below, fill in one priority communication objective from the worksheets you completed for Step 2. Below that, in the Intended Audience Segments column, list two intended audiences that your program needs to reach to achieve this objective. In the column to the right, make note of what you know to be true about each audience segment, as well as what you still need to learn. Make as many copies of this worksheet as you need for your priority communication objectives.

Communication Objective:

Intended Audience Segments	What Do You Know About This Audience Segment? What Do You Need to Learn?
You can describe an audience segment by saying, "We need to reach _____ [audience]___] who already _____ [is, knows, or does something]___."	What are each audience segment's needs, beliefs, values, and priorities? What do you still need to learn about each audience segment?
1.	
2.	

Step 4: Develop Messages

Values-Based Message Development Worksheet

In the top section of the worksheet below, fill in a communication objective (from Step 2) and an intended audience segment (from Step 3). Then craft a simple message for each of the message components in the left-hand column.

Communication Objective:

Example: By September of next school year, persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness.

Intended Audience Segment:

Example: Parents who have already had their child immunized.

Values-Based Message Frame What statement will link your efforts to your audience's core values?	*Example: We want to ensure our children enter school ready to learn and able to succeed.*
Outline the Benefits How will your audience benefit from what you are asking? Can you solve a problem for them?	*Example: Identifying any challenges before school starts means we can help a child learn more and be happier every day in class.*
Overcome Barriers How will you convince your audience that it is easy to say yes to your request?	*Example: The screening does not take a lot of time and can be a part of a regular visit to your pediatrician.*
Call to Action What specific steps do you want your audience to take?	*Example: Ask your pediatrician about scheduling a behavioral health screening.*

Step 5: Select Channels, Activities, and Materials

Planning Channels, Activities, and Materials Worksheet

In the top section of the worksheet below, fill in one intended audience segment and one message from Step 4. In the middle column below, identify channels, activities and events, and materials for delivering the message to the audience segment. In the right-hand column, note the frequency for sharing the message via the given channel, activity or event, or material. Make as many copies of this worksheet as you need.

Intended Audience Segment:

Message:

Delivery Methods	Description (Mix)	How Often? (Frequency)
Channels		
Activities and Events		
Materials		

Step 6: Develop Action Plan

Communication Competency Planning Worksheet

Use this worksheet below to map out what competencies your program has—from basic to advanced—to support your communication activities.

Communication Competencies	Staff Possesses	Partners Possess	Do Not Have
Basic Skills and Knowledge			
Communication planning			
Interpersonal communication			
Writing			
Health literacy			
Cultural and linguistic competence			
Intermediate Skills and Knowledge			
Materials layout and design			
Website development and search engine optimization			
Video production and editing			
Copyediting			
Project management			
Media relations			
Social media			
Team/staff management			
Communication monitoring and measurement			
Advanced Skills and Knowledge			
Communication evaluation and research			
Focus groups moderation			
Service procurement			
Contract management			
Communication of risk to high-burden populations			
Crisis communication			
Cross-Cutting Skills and Knowledge			
Training design and delivery			
Serving as spokesperson			
Finding software expertise (everything from PowerPoint to Photoshop)			

Action Plan Worksheet

In each row, list the primary task and subtasks, as well as target dates and person(s) responsible. Make as many copies of this worksheet as needed, or use this sheet as a guide for establishing an action plan that works for you.

Communication Objective:

Task/Subtask	Target Date	Estimated Cost	Person Responsible	Status
Task: Subtasks:				
Task: Subtasks:				
Task: Subtasks:				
Task: Subtasks:				

NATIONAL RESOURCE CENTER FOR

MENTAL HEALTH PROMOTION & YOUTH VIOLENCE PREVENTION

If you would like more information about the content of this workbook or about how the National Resource Center for Mental Health Promotion and Youth Violence Prevention can help you with the work you do, please contact us at:

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