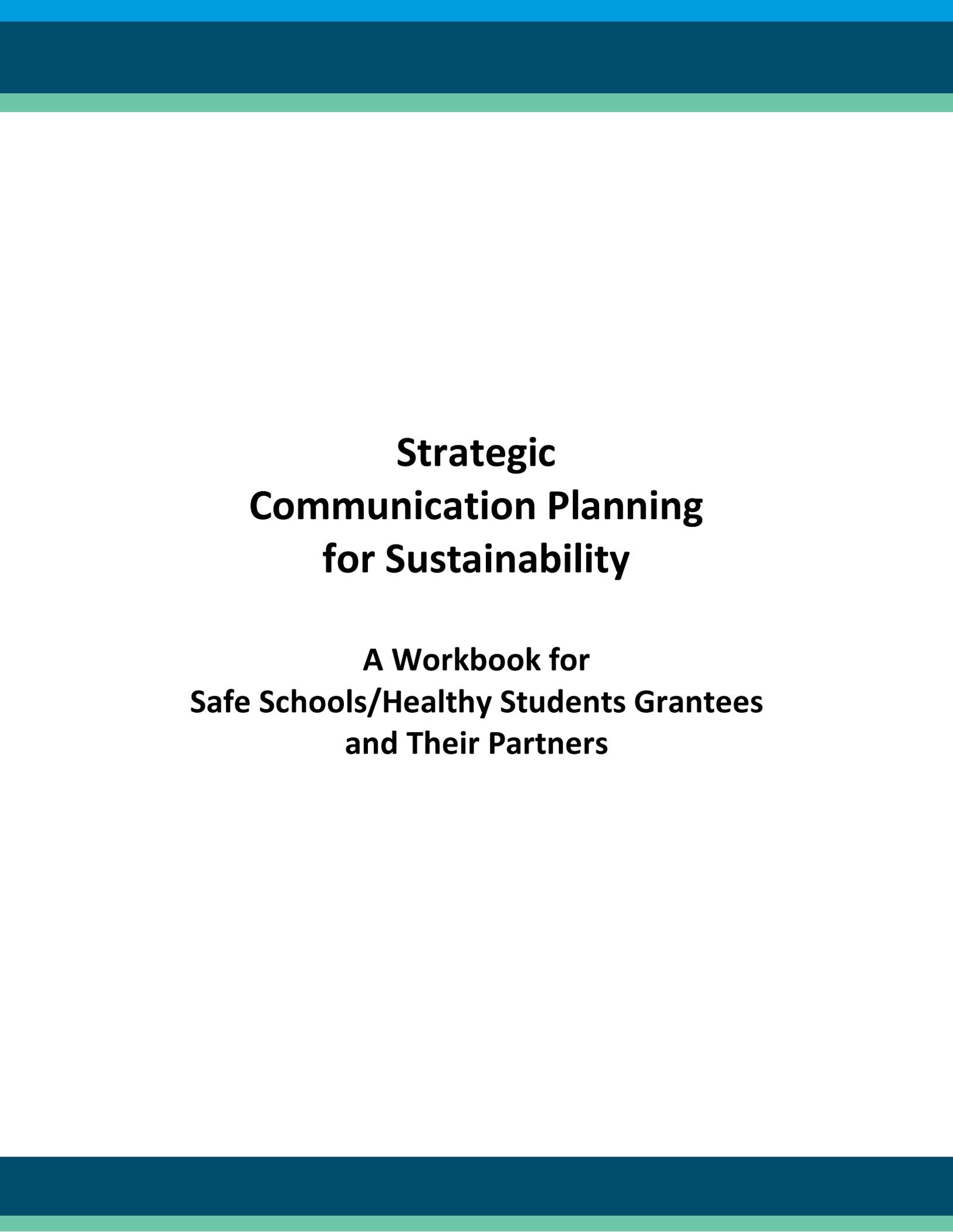# Strategic Communication Planning for Sustainability

A Workbook for Safe Schools/Healthy Students Grantees and Their Partners

Safe Schools
Healthy Students

Strategic
Communication Planning
for Sustainability

A Workbook for
Safe Schools/Healthy Students Grantees
and Their Partners

Contents

Welcome!

The Communication & Social Marketing Center team believes that effective communication begins with a strong strategic plan, developed for your grant site by 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 sustainability efforts.

Why Bother With Communication Planning for Sustainability?

Creating a communication plan for sustainability presents you and your partners with an opportunity to recommit to your ongoing success as a team. Your Safe Schools/Healthy Students (SS/HS) grant has allowed you and your partners to make a meaningful investment in your schools and community, but now it's time to ask others to join you in that effort. A communication plan can help.

Your plan will help uncover ways to deepen existing partnerships and develop new ones that hold the potential to help sustain—or even expand—key functions of your initiative. Your plan will allow you to make the most of your coalition's limited time and resources. Having a plan in place can help alleviate the stress many grantees feel near the end of Federal funding—stress that's often accompanied by the question, "What on earth do we do *now*?"

If you used communication at the start of your grant cycle, it's quite probable you focused on reaching those audiences you most wanted to engage in your programs and services. Typically, these audiences might have included:

- Parents—to encourage participation in select programs or to advise them of new opportunities provided by the grant;
- School staff, including teachers or principals—to get buy-in and create enthusiasm about new curriculums;
- District leaders or school boards—to keep them apprised of the grant's work and successes; and
- Students—to let them know about the programs and services available to them.

To support sustainability, you may now find it necessary to communicate your successes to the audiences that can help sustain select functions when grant funding ends. While this may include these earlier groups, it often means adding new and different audiences, and it's likely they won't be moved by the same strategies you've used in the past.

If you and your partners created a communication plan at the start of your grant funding, now is the perfect time to revisit that process, since you'll 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 grant award way back when; a brochure that describes your programs and services; a Web site that's updated every once in a while—now is the perfect time to turn those tactics to strategy.

Think it's too late to start a communication plan? We don't. In fact, the Communication & Social Marketing Center team believes it's never too early—and it's never 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.

The 8-Step Communication Planning Model[1]

The Communication & Social Marketing Center uses the 8-Step Communication Planning Model to provide a blueprint for planning, regardless of where you are in your grant cycle. It is not a "one-size–fits-all" tool, and it allows users to create site-specific, actionable communication plans. The model is based on the theory and practice of social marketing, which adapts commercial marketing techniques to influence people to take recommended actions or make positive changes in their lives.

This model, illustrated on page 4 of this workbook, will help you:

- Start with a thorough assessment of your current situation (Step 1);
- Set measurable communication goals and objectives (Step 2);
- Define your intended—sometimes called "target"— audiences (Step 3);
- Develop and pretest your messages to those intended audiences (Step 4);
- Select the best ways to deliver those messages (Step 5);
- Create an action plan for delivering your messages and materials (Step 6);
- Develop and pretest materials you wish to create (Step 7); and
- Implement, evaluate, and modify the plan (Step 8).

Every communication plan is a "living" document, and its ultimate success depends on a willingness to evaluate how implementation is going and make midcourse corrections as needed.

Using This Workbook

While this 8-step process works for your grant site *no matter where you are in your grant cycle,* this workbook is specifically written for SS/HS grant sites that are starting to think seriously about sustaining or even expanding key functions of their initiatives. This workbook can be used as a stand-alone planning tool for you and your partners, or it can be used in conjunction with facilitated training led by your communication specialist.

In addition to this introductory section, this workbook provides guidance and worksheets for completing the first five steps of the 8-Step Model. These steps represent the strategic component of your plan. The workbook also provides an understanding of Steps 6, 7, and 8—the steps that put your strategy on its feet. Finally, at the back of the workbook, you will find additional blank worksheets. As you work through this process with your partners, you may want to photocopy the blank worksheets to help your team brainstorm ideas.

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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).

Working With Your Communication Specialist

Your communication specialist can provide facilitated guidance for communication planning to you and your partners via the telephone, over the Web, and, if appropriate, through a visit to your site. After you create a communication plan, your communication specialist will continue to work with you to make sure your plan becomes a complete and actionable strategy that *works*.

The 8-Step Communication Planning Model

Step 1: Assess Your Current Situation

Purpose: To realistically assess your program by articulating your successes to date and your perceived challenges as you move toward sustaining your initiative.

The first step in developing your communication plan is to realistically assess your current situation. Why? Because you can't figure out where to go if you don't know where you are.

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 as you look ahead to sustainability. 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 list contains the types of questions you should consider as you work through this first step of the 8-Step Communication Planning Model for sustainability:

- Have you identified the functions you want to sustain?
- Are you serving the number of students and families you set out to serve?
- Are you effectively serving the variety of cultures in your community?
- Are your teachers and principals happy with your program? Are they "champions" yet?
- Is your superintendent seeing results? Have you regularly been presenting to your school board?
- Are you happy with your outcome data?
- Have you had any successful events around your initiative?
- Have the media covered your initiative?
- Are your partnerships committed to sustaining this initiative?
- How does money flow in your community? How is your competition funded?
- Who else do you need on board to sustain your initiative? Do you see your mission aligning with other organizations in your community?

Then, Conduct a SWOT Analysis

A SWOT analysis is an excellent way to take stock of where your program is right now. Think about your answers to the questions above. Now, complete the chart on the next page with the SWOT surrounding your program. Keep in mind the following:

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

Directions:

Consider your answers from the previous page, and complete this SWOT analysis.

Strengths	Weaknesses
Example: Strong school board support for initiative.	**Example:** Haven't yet communicated successes to community.

Opportunities	Threats
Example: Parent champions don't want program to go away.	**Example:** Substantial budget cuts mean greater competition for fewer dollars.

Step 2: Set Communication Goals and Objectives

Purpose: To articulate your intended accomplishments in ways that can be measured.

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 early on will help you get there.

Your communication goals should:

- Support your sustainability goals;
- Support the activities in your logic model; and
- Clearly articulate what you want to accomplish.

Set communication goals that:

- Raise awareness of an issue or effort;
- Engage audiences to take action on your behalf;
- Are realistic; and
- Can be measured, so you'll know when you've succeeded.

For example:

If your *goals for sustainability* include:

1. Keeping the School Resource Officer (SRO);
2. Expanding the mentoring program to middle schools districtwide; and
3. Maintaining mental health and counseling services …

Then your **communication goals** will focus on educating, engaging, and generating buy-in from the various target audiences who can help you achieve those goals. For example:

1. Garnering partner support to retain the SRO position;
2. Identifying and engaging new, quality mentors; and
3. Obtaining buy-in from the school board to sustain mental health and counseling services.

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're *not* goals. These are tactics—ideas 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'll take a look at more tactics in Step 5. For now, take a step back, think strategically, and create those *goals*!

Directions:

- List up to five desired communication goals. Don't forget to take into account your findings from Step 1.
- Prioritize those goals by ranking them from 1 to 5 in the far right column. Your number 1 goal should be your highest priority.

	Communication Goals and Objectives	Prioritize 1–5
Goal		
Goal		
Goal		
Goal		
Goal		

Step 3: Identify Intended Audiences

Purpose: To identify all potential intended—sometimes called "target"—audience segments for each communication goal; to prioritize those audiences and learn as much as possible about them.

Now that you've identified your communication goals and objectives, it's time to identify the specific audiences you need to reach for each goal. To put it another way, it's 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 grant cycle 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.

Next, Segment Your Intended Audiences

Segmenting your audiences is a critical—and often overlooked—step to creating communication messages and materials that resonate. As an example, let's consider a typical intended audience group for sustainability: *local businesses.*

Let's say your communication goal is "To obtain support for afterschool programs." You know that local businesses are concerned with truancy in the hours that follow the school day, and you can illustrate the benefits of keeping youth occupied 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. To create the most effective communication strategy, segment your broader intended audience into subgroups on the basis of their needs, values, and/or mission. For example—

- Businesses that employ high school students after school or during the summer, thereby illustrating that they already value local youth;
- Businesses in close proximity to your school campuses and may be most directly affected by the elimination of afterschool programs;
- Business leaders who have demonstrated an interest in investing in your community's children, particularly around the issues of education and health;
- Business leaders who are active in your Chamber of Commerce's community services committee; and
- Business leaders who have children enrolled in your schools.

Breaking down your general audience into segments helps you craft messages and materials that are specifically tailored to them.

Then, Prioritize Your Intended Audience Segments

You may now find that, instead of communicating to local business, 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 hasn't. You can prioritize your intended audience segments and focus your efforts (strategically!) on those groups at the top of your list.

To help in this process, ask yourself, which segment is most likely to give the support you need? Who needs to be reached first? Which segment's mission most closely resembles yours?

Directions for Worksheet A:

- Write one priority communication goal from the previous step in the top section of this worksheet.
- In the first column, list up to three intended audiences you need to reach for this goal, then prioritize those audiences in the second column.
- For your top priority audience, identify up to three audience *segments,* and prioritize each segment.

Goal:			
Intended Audiences	**Priority**	**Audience Segments**	**Priority**

Now, What Do You Know About Your Audience Segments?

Once you've 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 are they supportive of it? Which parts of your communication goals for sustainability align with their concerns? What's the best way to reach them?

It's 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.

What Data Do You Have To Make Your Case?

Take this opportunity to inventory the data you've collected to date. Assess the data's reliability so you can be sure to work with information that is truly representative of your site's delivery and outcomes. Work with your evaluator to separate your data into categories that will make it easier for you to extract the specific information that will be most meaningful to your intended audiences.

Finally, How Will They Want To See Your Data Presented?

No matter which data you use or which audience segment you've 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*; and
- Delivered by a source that's trustworthy *to them.*

With all you've already learned about your intended audience, you'll have an easier time assessing which kind(s) of message and data delivery methods will work best.

Directions for Worksheet B:

- Write your top priority audience segment in the first line of this worksheet.
- In the *Profile* section, indicate as much as you know about that audience segment.
- Use the *Data Preferences* section to check off the qualitative and quantitative information that you believe this audience segment will want—and whether you have it.
- Use the *Message and Data Delivery Preferences* section to identify what you believe will be the best methods for effectively delivering your data and messages to your audience segment.

Audience Segment:	

Profile	
Areas of concern	**Shared values (where your values align)**
Benefits to *them*	**Barriers to overcome**
Trusted sources of information (include individuals)	**Other (e.g., key dates, such as budget deadlines)**

Data Preferences					
Quantitative (hard data)	**They Want It**	**We've Got It**	**Qualitative (anecdotal)**	**They Want It**	**We've Got It**
Student behavior			**Student successes**		
Number of students served			**Teacher satisfaction**		
Costs			**Parent satisfaction**		
Satisfaction			**Initiative/program success**		
School climate			**School climate**		
Academic indicators			**Other:**		
Other:					

Message and Data Delivery Preferences (circle as many as apply)		
Face-to-Face Meeting	**Group Presentation**	**Public Testimony**
Charts/Graphs	**Social Math Equations**	**PowerPoint Presentation**
Narrative Report	**Factsheets/Program Profiles**	**Newsletter/E-newsletter**
Brochure	**Web site**	**Web 2.0 (Social Media)**
Media Coverage	**Email**	**Other: _____**

Step 4: Develop and Pretest Messages

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

Messages can be *informative* (convey new facts to raise awareness) or *persuasive* (alter attitudes, change behavior, or persuade action). Sometimes, they are both. They can convey the key information you and your team want audiences to know about your initiative. These messages can become the underlying themes highlighted and repeated in your materials and activities. They can be used as the basis of talking points, presentations, one-on-one discussions, or any other materials or other tactics intended for your audiences. For example, an overarching message running 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 audiences, all of whom are affected by tight budgets and limited resources. For each intended audience, effective messages:

- Convey the relevance of sustaining the service or activity to their beliefs and values;
- Show the urgency of the program by relating it to the core concerns in their lives;
- Put a "face" on the issue or program;
- Motivate them to think, feel, and act;
- Use language that is as free of technical, scientific, or bureaucratic jargon as possible; and
- Make complete sense to them.

Four Components to an Effective Message

Developing messages that resonate deeply with your audiences is challenging under the easiest of circumstances. It helps to remember that it's not what we *want* them to hear, it's what they are *able* to hear. The trick, of course, is identifying and crafting specific messages that make sense to them while also promoting our initiatives effectively.

To overcome this challenge, we need a process for developing messages that can meet any audience "where they are" and provide them with exactly the information they want to hear. To do this, you can create four simple message components that can be mixed and matched to meet the needs of any audience for any purpose. These components:

- Provide a frame for your message that is based in your audience's values;
- Outline the benefits to your audience;
- Overcome any barriers your audience may have; and
- Provide a call to action, or next steps, that you want your audience to take.

Value-Based Message Frame

A message *frame* provides a context through which your audience can easily understand your issues. And a successful message frames your issues in the context of a *value* that your audience cares about. Creating a value-based frame for your message can significantly improve the likelihood that your audience will truly hear you, because it illustrates that you and your audience share the same hopes for your community and its future.

To craft a value-based message frame, consider how your audience might answer this question: "What kind of community do we want to live in?" 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 community do we want to live in? A community that's …				
Thoughtful	Caring	Safe	Honest	Just
Diverse	Healthy	Respectful	Creative	Successful
Responsible	Fair	Optimistic	Wise	Hopeful
Equitable	Realistic	Educated	Family focused	Authentic

By crafting a value-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.

Outline Your Benefits

Your audiences will want an understanding of how your message 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.

To anyone already involved with SS/HS, it may seem as though the greatest benefit comes from helping youth, but that might not be true for potential partners:

- 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 Web site.
- Your 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.

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 how you are asking something that is *easy* for them to do.

As you are developing the message components that outline your benefits and overcome their barriers, don't forget to review the findings you captured in Step 3—it will help you keep your focus on your audience's needs, wants, and preferences as you craft language. Both of these message components are also a "natural fit" for including specific quantitative data, anecdotal stories, or social math that will resonate with your audience and help make your case.

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 mountains all 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 followup meeting to go into greater detail about your solution.

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; or,
- *Change a behavior*.

It's time for you to craft your own message components with the worksheet on the next page.

Directions:
- Enter your priority goal and intended audience at the top of the worksheet.
- Craft a simple message for each component. The ideas in the right-hand column can help guide your thinking.

Communication Goal:	Intended Audience Segment:
Message Component	**Your Messages**
Value-Based Message Frame Consider: What statement can link your efforts to your audience's core values?	
Outline Your Benefits Consider: How would your audience members benefit from what you're asking? Can you solve a problem for them? How will partnership with you be a "win" for them?	
Overcome Their Barriers Consider: How you will convince your audience that it's easy to say "yes" to your requests? Data and stories may help you with this message component.	
Call to Action Consider: What specific next 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.

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 if the messages are persuasive. Ask a few members of an intended audience for input. If you find that a particular message doesn't 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. Pretesting methods are discussed in greater detail in Step 7 of this workbook, on page 22.

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 way(s) 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?

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

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

Communication channels carry your messages to the intended audiences. Channels take many forms, and there is an almost infinite list of possibilities. Some examples of channels include:

People (you, your champions)	Television stations
Radio stations	Newspapers
Web sites	Community centers
Email, email lists	Laundromats
Malls	Parks
Schools	Libraries
Recreation centers	Nonprofit organizations
Supermarkets	Restaurants

Activities, Events, and Materials

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

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

Frequency and Mix

To conceptualize frequency and mix, imagine a young child asking her parent 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 would ask 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 a long day. Parents might cringe at the thought of this, but you have to applaud the persistence and ingenuity of these young marketers who are oftentimes successful.

The same principle applies to you and your initiative. For example, your school district is far more likely to support your sustainability efforts if they have received regular updates from you and your staff for the past 3 years, rather than one PowerPoint presentation when you first won the grant. Similarly, a simple PowerPoint presentation might not convey the full impact of your SS/HS initiative to the board; students or SRO officers telling their stories of how the initiative has positively impacted their lives could be far more powerful.

This principle also applies to the business community, particularly in this challenging economic time. Local business leaders are more likely to assist your sustainability efforts if you have regularly communicated the benefits their businesses receive because of the SS/HS initiative. One-on-one meetings, flyers, or perhaps an invitation to an event could communicate how their businesses benefit from lower truancy rates and a better-educated and well-behaved workforce. Increased graduation and college attendance rates could also translate into better-paying jobs for these SS/HS students, which means they will have more money to spend in local stores later—helping to sustain the SS/HS initiative could clearly be seen as a long-term investment in the success of a local business if communicated with the appropriate "frequency and mix." Think about this as you complete the worksheet on the next page; consider any and all channels, activities, events, and materials that can help you effectively deliver your message to your intended audience.

Directions:

- Thinking about the priority intended audience segment, from Steps 3 and 4, use the worksheet below to identify the channels, activities, events, or materials that will most effectively deliver your message.
- Consider the frequency and mix of your delivery.

Goal:		
Intended Audience Segment:		
Message (based on message components from Step 4):		

Delivery Methods	Description (Mix)	How often? (Frequency)
Channel		
Activities and Events		
Materials		

Step 6: Develop Action Plan

Purpose: To determine where, when, and how each task will be done to successfully implement your communication plan for sustainability.

This step makes sure that all the hard work you've done 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 SS/HS project director knows how important that is.

We encourage shared participation in putting your plan on its feet. Commitment from staff members, partners, volunteers, and champions tells your community there is wide support for your goals—and it might encourage potential new partners to get on board.

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; and
- The person responsible for ensuring that each task is completed.

Below is a sample of one task in a basic action plan (a blank copy is located with other worksheets at the end of this workbook):

Task/Subtask	Target Date	Person Responsible
School Board presentation on school safety	**November 16**	**Emily**
• Finish datasets.	September 1	Molly
• Gather "success stories" from principals.	September 18	Angela, Mary
• Draft PowerPoint.	September 28	Emily
• Draft factsheet as leave-behind for board.	October 7	Mary
• Hold conference call with communication specialist.	October 9	Emily, Molly
• Confirm presentation time with district secretary.	October 15	Glenda
• Confirm availability of SRO and sheriff for meeting.	October 15	Charles, John
• Prepare talking points for SRO/sheriff.	October 26	Mary
• Revise PowerPoint and factsheet.	October 26	Mary
• Submit materials for superintendent review and feedback.	November 1	Emily
• Make final edits to materials.	November 12	Mary
• Attend board meeting.	November 16	Emily

Step 7: Develop and Pretest Materials

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

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 value 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're tempted to skip pretesting, think about the potential pitfalls. Remember, we may think we fully understand our intended audience, but we probably don't. Pretesting can save us from making costly mistakes.

Pretesting helps you:

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

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

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

There are several ways to pretest messages and materials, including:

- Surveys;
- Focus groups;
- One-on-one interviews; and
- Advisory boards.

Admittedly, if you're planning a face-to-face meeting with an individual who represents a potential champion for your initiative, it's tough to pretest your message or materials with him or her. In such a case, it's a good idea to rehearse your presentation and ask someone who isn't connected with your program's work to look at your materials. While you may not be able to gauge the full impact of what you've developed, you'll at least be able to make sure that you're presenting information in a way that's easy for anyone to understand.

Don't forget: When creating communication materials, make certain to add time for pretesting into your action plan.

Step 8: Implement, Evaluate, and Modify 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's 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, don't worry; it's 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; and
- Create and implement new strategies for reaching your goals and objectives.

Congratulations!

By working through the exercises in this book, you have made a genuine commitment to the success and long-term sustainability of your SS/HS 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; and
- Deliver those messages in ways that meet the needs and preferences of your audiences.

Additionally, you recognize that the best plans are worth no more than the paper on which they're 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; and
- Implement, evaluate, and modify your plan.

Moving Forward

We've seen the communication planning process do great things for grant sites. If sustainability is, indeed, a benchmark for SS/HS initiatives nationwide, then communication planning for sustainability can be a critical tool for all grantees who wish to leave a lasting footprint in their communities.

The Communication & Social Marketing Center wants to support you through all of your communication efforts, providing the necessary training and technical assistance to help you sustain your initiative. Please feel free to contact your communication specialist with any questions. He or she will be happy to assist you in tapping into the wealth of free communication resources available to you.

Communication & Social Marketing Center
Phone: 1-800-790-2647
Email: team@csmcenter.org

Resources for Health Communication and Social Marketing

BOOKS

Andreasen, A.R. (2002). *Marketing research that won't break the bank: A practical guide to getting the information you need*. San Francisco: Jossey-Bass Publishers.

Andreasen, A.R. (1995). *Marketing social change: Changing behavior to promote health, social development, and the environment*. San Francisco: Jossey-Bass Publishers.

Backer, T., Rogers, E., and Sopory, P. (1992). *Designing health communication campaigns: What works?* Newbury Park, CA: Sage Publications.

Center for Substance Abuse Prevention. (1994–1998). *Technical assistance bulletins: Guides for planning and developing your ATOD prevention materials*. Rockville, MD: Substance Abuse and Mental Health Services Administration. (Free from the National Clearinghouse for Alcohol and Drug Information at 1-800-729-6686.)

Earle, R. (2002). *Art of cause marketing: How to use advertising to change personal behavior and public policy*. New York: McGraw-Hill.

Huff, R.M., and Kline, M.V. (1999). *Promoting health in multicultural populations: A handbook for practitioners.* Newbury Park, CA: Sage Publications.

Kotler, P., and Roberto, E.L. (1989). *Social marketing: Strategies for changing public behavior*. New York: Free Press.

Kotler, P., Roberto, N., and Lee, N. (2002). *Social marketing: Improving the quality of life*. Thousand Oaks, CA: Sage Publications.

McKenzie-Mohr, D., and Smith, W. (1999). *Fostering sustainable behavior: An introduction to community-based social marketing* (Education for Sustainability Series). Gabriola Island, BC: New Society Publishers.

National Cancer Institute. (2001). *Health communication programs work.* Bethesda, MD: National Institutes of Health. (Free from the Cancer Information Service at 1-800-4-CANCER.)

National Center on Child Abuse and Neglect. (1996). *Marketing matters: Building an effective communications program.* Washington, DC: Administration for Children and Families. (Free from the Child Welfare Information Gateway at 1-800-394- 3366.)

Pringle, H., and Thompson, M. (1999). *Brand spirit: How cause-related marketing builds brands.* West Sussex, England: John Wiley & Sons.

Rice, R.E., and Atkin, C.K.. (2000). *Public communication campaigns.* 3rd ed.
Thousand Oaks, CA: Sage Publications.

Rogers, E. (1995). *Diffusion of innovations.* 4th ed. New York: The Free Press.

Weinreich, N.K. (1999). *Hands-on social marketing: A step-by-step guide.*
Thousand Oaks, CA: Sage Publications.

JOURNALS

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

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

American Journal of Public Health
http://www.ajph.org

Health Education & Behavior
http://www.sph.umich.edu/hbhe/heb

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

Journal of Health Communication
http://www.gwu.edu/~cih/journal

Social Marketing Quarterly
http://www.tandf.co.uk/journals/titles/15245004.asp

WEB SITES

National Cancer Institute's Pink Book—*Making Health Communication Programs Work*
http://www.cancer.gov/pinkbook

Social Marketing Institute
http://social-marketing.org

Health Canada's Social Marketing Network
http://www.hc-sc.gc.ca/english/socialmarketing/

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 you and your partners to use.**

Step 1: Assess Your Current Situation
SWOT Analysis Worksheet

Strengths	Weaknesses

Opportunities	Threats

Step 2: Set Communication Goals and Objectives

	Communication Goals and Objectives	Prioritize 1–5
Goal		
Goal		
Goal		
Goal		
Goal		

Step 3: Identify Intended Audiences
Worksheet A

Goal:			
Intended Audiences	**Priority**	**Audience Segments**	**Priority**

Step 3: Identify Intended Audiences
Worksheet B

Audience Segment:

Profile	
Areas of concern	**Shared values (where your values align)**
Benefits to *them*	**Barriers to overcome**
Trusted sources of information (include individuals)	**Other (e.g., key dates, such as budget deadlines)**

Data Preferences					
Quantitative (hard numbers)	**They Want It**	**We've Got It**	**Qualitative (anecdotal)**	**They Want It**	**We've Got It**
Student behavior			**Student successes**		
Number of students served			**Teacher satisfaction**		
Costs			**Parent satisfaction**		
Satisfaction			**Initiative/program success**		
School climate			**School climate**		
Academic indicators			**Other:**		
Other:					

Message and Data Delivery Preferences (circle as many as apply)		
Face-to-Face Meeting	**Group Presentation**	**Public Testimony**
Charts/Graphs	**Social Math Equations**	**PowerPoint Presentation**
Narrative Report	**Factsheets/Program Profiles**	**Newsletter/E-newsletter**
Brochure	**Web site**	**Web 2.0 (Social Media)**
Media Coverage	**Email**	**Other: _____**

Step 4: Develop Messages

Communication Goal:	Intended Audience Segment:
Message Component	**Your Messages**
Value-Based Message Frame Consider: What statement can link your efforts to your audience's core values?	
Outline Your Benefits Consider: How would your audience members benefit from what you're asking? Can you solve a problem for them? How will partnership with you be a "win" for them?	
Overcome Their Barriers Consider: How will you convince your audience that it's easy to say "yes" to your requests? Data and stories may help you with this message component.	
Call to Action Consider: What specific next steps do you want your audience to take?	

Step 5: Select Channels, Activities, and Materials

Goal:

Intended Audience Segment:

Message (based on message components from Step 4):

Delivery Methods	Description (Mix)	How often? (Frequency)
Channel		
Activities and Events		
Materials		

Step 6: Develop Action Plan

Task/Subtask	Target Due Date	Person Responsible
TASK: • **Subtasks:**		
TASK: • **Subtasks:**		
TASK: • **Subtasks:**		
TASK: • **Subtasks:**		
TASK: • **Subtasks:**		

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