

# Communication Planning for Program Success and Sustainability

## Welcome

Welcome to the final module in this three-part series on Communication Planning for Program Success and Sustainability.

## Credits

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## Modules in This Series

The modules in this series are as follows:

**Module 1:** *Introduction to Strategic Communication Planning*, which covers communication through a social marketing lens, preparing to communicate, a strategic approach to communication planning, assessing your current situation, and setting your communication goals and objectives.

**Module 2:** *Developing Your Communication Strategy*, which covers identifying your intended audiences, developing and pretesting your messages, and selecting your communication channels, activities, materials, and partnerships.

**Module 3:** *Moving from Strategy to Action*, which covers developing your communication action plan, creating and pretesting communication materials, and implementing, evaluating, and modifying your communication action plan.

## This Module

In Module 3, you'll use the communication strategy you developed in Modules 1 and 2 to create a communication action plan and begin to draft the materials that will carry your messages. We'll also review how you can gauge your success and, if necessary, make midcourse corrections.

First, though, let's do a quick review of what you learned in Module 2.

## Brief Review of Module 2

In Module 2 in this series, we focused on Steps 3, 4, and 5 of the 8-Step Model for Communication Planning. In Step 3, we reviewed the importance of understanding and segmenting your intended audiences. Step 4 addressed how to develop and pretest a values-based message that aligns with the beliefs and priorities of your audience segment. In Step 5, we addressed how—and how often—to deliver your message by selecting the channels, materials, and activities best suited for your audience.

Based on the work you did in Modules 1 and 2, you now have a mapped-out communication strategy for your program.

## Step 6: Develop an Action Plan

As you know, a strategy without a plan is only a piece of paper with good ideas on it. In Step 6, it's time to turn your strategy into an action plan. In this step, you will explore:

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

## Action Planning

Many of us use action plans in our daily lives, such as planning what we want to accomplish for the day or planning our meals for the week. These to-do lists drive the actions we need to take. Now it's time to create an action plan for your strategic communication efforts.

## Components of a Communication Action Plan

In Step 5 you identified *what* you would use to deliver your message—the channels, materials, activities, and partnerships for your communication efforts. In Step 6, you'll plan *how* to implement those efforts.

Action plans provide a road map for implementing your activities. The action plan maps out how you will achieve your communication goals and objectives. For example, if your communication objective is to garner support from the school board to finance additional school-based mental health counselors, one task or activity might be to deliver a presentation to the school board. Creating the presentation will require gathering success stories, developing a presentation and a fact sheet for the board, having the draft materials reviewed, revising and printing the materials, and, of course, making the presentation.

The action plan outlines when each step will be completed, designates who is responsible for which task, allows you to track the status of each step, and includes the estimated cost of each task. It's important to consider the cost of each task or activity. If you don't have the money for a given task or activity, you'll need to find it or modify the activity.

An action plan can be a simple table. You can create it in Word, Excel, or any other software that works for you and your staff.

Next let's consider how to assign communication tasks.

## **Match Your Staff to the Right Tasks**

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 your communication efforts.

It is important to match the skills and availability of your staff and program partners with the communication activities assigned to them. If you need a skill that no one on your team possesses, you may need to find outside help or, if your budget is very limited, hire an intern who has the skills you need.

Basic Skills and Knowledge in Communication include the following:

- Communication planning
- Interpersonal communication
- Writing
- Health literacy
- Cultural and linguistic competence

Intermediate Skills and Knowledge in Communication include the following:

- 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 in Communication include the following:

- Communication evaluation and research
- Moderating focus groups
- Service procurement
- Contract management
- Communication of risk to high-burden populations
- Crisis communication

Cross-Cutting Skills and Knowledge in Communication include the following:

- Training design and delivery
- Serving as spokesperson
- Finding software expertise (everything from PowerPoint to Photoshop)

## Creating an Effective Mix of Staff and Partners

Creating the right mix of staff and partners is crucial for implementing your communication action plan. Ask the following questions to learn more about your staff members' and partners' strengths and weaknesses:

- 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?

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.

## Budgeting for 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. Additional issues to explore when creating your communication budget include remembering hidden costs, working with your partners, and considering scaling back.

With regard to remembering hidden costs, don't forget costs that you might otherwise overlook. If you're 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 has access to power?
- Provide water or other beverages, since the event will be outdoors?

Think about whether your program's partners can help to defray communication costs. You could ask a local public relations company to provide *pro bono* communication support. Is there a local business that might cosponsor one or more events and help to cover the costs? If yes, be sure to thank the business prominently on your website and on social media. If feasible, consider launching a crowd-funding campaign, which is an effort to raise financial contributions from many people, often using an online platform such as Kickstarter.

If you still can't fund a specific communication activity for your program, scale back your plans. For example, if you can't afford to hire a focus group facilitator to test your communication messages with parents, conduct a simple survey by setting up a table in front of a grocery store on a Saturday morning and asking for five minutes of parents' time as they enter the store.

## Myths and Misconceptions About Health Communication Costs

For each of the following statements, consider whether you agree or disagree.

- Statement 1: Communication is expensive. Do you agree or disagree?
- Statement 2: Using social media is inexpensive, and it can replace more traditional media. Do you agree or disagree?
- Statement 3: If our program doesn't have enough time or money, we can skip pretesting our messages and materials. Do you agree or disagree?

Regarding the statement "Communication is expensive": Effective communication can be inexpensive or expensive. You can make the most of your program's communication resources by planning carefully and partnering with other organizations.

Regarding the statement "Using social media is inexpensive, and it can replace more traditional media": Social media channels are technically free, but strategic use of social media takes dedicated staff hours. And social media should be part of your media mix, not a replacement for other media.

Regarding the statement "If our program doesn't have enough time or money, we can skip pretesting our messages and materials": Skipping pretesting can be very risky. Pretesting messages and materials doesn't have to be a time-consuming or expensive process.

## Implementing Your Communication Action Plan

One of the last steps in implementing your communication action plan is determining in what order and when activities will happen.

Sequencing and scheduling 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 refers to scheduling activities in relation to events happening outside your program. To engage your intended audiences, you should ensure that your activities don't conflict with holidays, celebrations, school or university schedules, and important community or political events.

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.

## Step 6 Worksheet

To access the Step 1 worksheet, go to:

<http://airhsdlearning.airws.org/comm3materials/Mod3WksStep6-508.docx>

## Step 7: Develop and Pretest Materials

Now that you have an action plan and know what needs to be done, let's tackle Step 7: Develop and Pretest Materials.

What materials must be created? Before you begin creating new materials, look into whether you can save time and money by adapting existing materials.

As you're developing and adapting materials, consider whose input is needed. Do you need a subject matter expert to provide some factual content? Do you need a creative person who can help with layout and design?

You also need to pretest your materials to make sure they resonate with your intended audience segments. If you didn't already pretest your messages in Step 4, do it now!

## Sample Materials (A Look Back at Step 5)

Think back to Step 5 and some of the materials you may have identified for your communication activities—such as PowerPoint presentations, fact sheets, posters, videos, and newsletters.

Now it's time to make your ideas a reality.

## Adapt Existing Materials Or Develop New Ones?

Let's consider some benefits and drawbacks of creating new communication materials for your program versus adapting existing materials.

The benefits of adapting existing materials include that the message may have been vetted and tested, and the materials may cost less to create, purchase, or produce. The drawbacks can include that the materials may not be effective for your intended audiences, and that challenges may emerge related to attribution and cobranding. For example, if you want to develop a poster to persuade high school students not to drink and drive, you might find an existing poster on this topic. Be sure to pretest it with some students in your school to see if the messages and images are persuasive. If they are, using the poster as is or adapting it may be a good option.

Depending on the situation, adapting existing materials may not be a viable option. For example, if the images or content of existing materials do not reflect the ages, races, and cultures of your intended audiences, you may need to develop new materials. Doing so will enable your program to completely customize the materials to your audiences, and your program will have full ownership of any materials you create. The primary drawback of developing new materials is that it typically takes more time and money to develop and pretest new materials than to adapt existing ones.

## Decision Tree for Adapting Existing Materials

Do you have or know of existing materials with similar communication objectives? If you don't, conduct a thorough search. If you can't find any, you may need to develop new materials.

If you know of existing materials with similar communication objectives, consider whether the existing materials are relevant, accurate, compelling, and well designed. If they are not, determine whether you can revise the materials to address these issues.

If the existing materials are relevant, accurate, compelling, and well designed, explore whether the existing materials are copyright free and/or available for adaptation and reproduction. If they are not, look into securing permission to use or adapt the materials from the organization that holds the copyright.

If the existing materials are relevant, accurate, compelling, and well designed, consider whether your program has the resources to adapt and reproduce them. If not, do you have the funds to adapt and reproduce a streamlined version of the existing materials? If you can't do that, consider developing new materials that fit with your program's budget. If you do have the resources to adapt and reproduce the existing materials, then do so!

This information is adapted from C-Change 2011. *Voluntary medical male circumcision Communication material adaptation guide*. Washington, DC: C-Change/FHI 360.

## Federal Government Communication Materials

**For a list of federal agencies that disseminate communication materials that your program may want to use or adapt for your intended audiences, go to:**

<http://airhsdlearning.airws.org/comm3materials/Mod3WksFedComResrcs508.docx>

## Pretest Messages and Materials

Pretesting your communication messages and materials is a critical step that should not be overlooked. Before you develop new materials, it's 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're considering adapting existing materials), pretesting will help you understand whether they resonate with your audiences. As you pretest, share the draft materials or messages with audience members, and ask open-ended questions about the messages/materials and their understandability, visual appeal, relevance, and cultural and linguistic competence.

Ask about any negative responses to the materials/messages and improvements that may be needed. Be sure to use what you hear during pretesting to improve and refine your materials and messages.

## Pretest Messages and Materials

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

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.

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

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

It's important to remember that your action plan is a living document. It is not set in stone. It's important to review periodically how things are going and determine if adjustments need to be made. This is easy to do if you're effectively monitoring progress and assessing results. As you review the action plan, consider the following questions:

- How will you know your action plan is having the desired effect?
- What adjustments might you need to make to the plan?
- What will you do next?

## Take a Fresh Look at Your Communication Goals and Objectives

Let's 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 communication goals and objectives, you also developed 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, it will also help you determine if your communication efforts helped drive the change you wanted to see.

## Monitoring Versus Evaluation in Communication

Monitoring and evaluation are related, but they serve distinct purposes. For the purposes of this module, "monitoring" refers to measuring progress toward achieving your communication *objectives*. Monitoring typically emphasizes process measures (e.g., how many people attend a program event).

Evaluation measures progress toward achieving communication goals (which are often related to bringing about change in intended audiences). Evaluation involves collecting baseline data, tracking changes in behaviors along the way, and reporting outcomes.

## SMART Communication Goal and Objectives (from Step 2)

Let's review the SMART communication goal and objectives we discussed in Step 2. Our communication goal is to persuade 65 percent of parents of entering kindergarteners to have their child screened for behavioral wellness by September of the coming school year.

Our communication objectives are as follows:

- By May of next school year, provide information about behavioral screening to all parents of entering kindergarteners.
- By June of next school year, persuade six facilities (including schools and health clinics) to host back-to-school behavioral screening events.
- By September of next school year, promote screening events to parents through schools, pediatricians, health clinics, child care centers, and social media.

Next let's consider ways to evaluate and monitor this program's progress.

## Evaluating Progress Toward Achieving a Communication Goal

Let's start with how to evaluate progress toward achieving this communication goal. To evaluate something, we need to compare what *was* (baseline data) to what *is* (outcome data).

For baseline data, it's important to know how many incoming kindergarteners had been 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 actually have their child screened.

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

- In the past 3 to 6 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 child screened?

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

## Monitoring Progress Toward Achieving Communication Objectives

Now let's look at monitoring progress toward achieving communication objectives. The first objective for this communication goal is as follows: By May of next school year, provide information about behavioral screening to all parents of entering kindergarteners.

The following are potential activities for reaching this objective:

- Include a flyer about behavioral screening in the registration packet sent to parents of incoming kindergarteners.
- Give flyers to local preschool programs and child care centers to distribute to parents.
- Send an email message about behavioral wellness screening to parents of incoming kindergarteners.
- Post messages about behavioral wellness screening on the school district's Facebook page.

You can measure completion of these activities—and progress toward this objective—through simple metrics such as the following:

- Number of flyers mailed to parents
- Number of flyers given to preschool programs and child care centers
- Number of emails sent to parents
- Number of behavioral screening posts on the district's Facebook page; number of shares and comments on each post

For this objective, monitoring is used to measure whether the program provided the information to the intended audience. And because you created SMART communication goals and objectives, identifying appropriate metrics should not be difficult.

## **Monitoring Progress Toward Achieving Communication Objectives**

For each of the following potential activities, select an appropriate metric.

Potential activity #1: Hold meetings with the district's elementary school principals, the director of the local health clinic, and the directors of the four largest local preschool programs. Which of the following is the most appropriate metric for this activity:

- Number of meetings held.
- Number of copies distributed at meetings.
- Number of follow-up phone calls made and emails sent.

The correct metric for this activity is Number of meetings held.

Potential activity #2: Create and distribute at meetings a fact sheet on the benefits of screening pre-kindergarteners for behavioral wellness. Which of the following is the most appropriate metric for this activity:

- Number of meetings held.
- Number of copies distributed at meetings.
- Number of follow-up phone calls made and emails sent.

The correct metric for this activity is Number of copies distributed at meetings.

Potential activity #3: Follow up with principals, the health clinic director, and preschool program directors about whether they will host a screening event. Which of the following is the most appropriate metric for this activity:

- Number of meetings held.
- Number of copies distributed at meetings.
- Number of follow-up phone calls made and emails sent.

The correct metric for this activity is Number of follow-up phone calls made and emails sent.

## Embrace Midcourse Corrections

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 if you need to modify them. For example, it's possible that parents of incoming kindergarteners still don't believe that their child's behavioral wellness is a big issue. Or perhaps elementary school principals don't think it's 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're having trouble convincing preschool program directors and principals to host a screening event, perhaps you should invite someone to the meeting who knows the principal or program director and who already values screening children for behavioral wellness.

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

## Communication Planning Is Iterative and Cyclical

Congratulations! You've worked through the entire 8-Step Model for Communication Planning. You've learned that the process is iterative, with each step building on the work of the previous step.

You've also no doubt noticed that the model isn't linear. There is no end to effective communication. Once you've achieved one set of communication goals, you'll discover that you're ready for more—you'll have identified new audiences to connect with, new initiatives to launch, new partners to integrate into your efforts, and new successes to communicate to enhance your program's sustainability.

The following is a brief review of each step in the model.

Step 1: You assessed your current situation, taking a snapshot in time of where you were when you started the communication planning process.

Step 2: You set meaningful communication goals that answered the question “What do you want your audience to do that they are not already doing?” To support your goals, you developed communication objectives and activities. Your goals and objectives were SMART: specific, measurable, attainable, relevant, and time-bound.

Step 3: You identified and segmented your intended audiences, and began to identify the values, beliefs, and priorities that motivate your audiences.

Step 4: You learned that it’s not what you *want* your audience to hear, it’s what they are *ready* to hear. You crafted values-based messages that align with your audiences’ values, outlined the benefits of your solution, overcame potential barriers, and identified a specific call to action. You also pretested your messages with members of your intended audience.

Step 5: You explored the many ways in which you can reach your audiences and elected communication channels, activities, materials, and partnerships based on how and when your audience is likely to be most receptive to your message.

Step 6: You mapped out an action plan for your communication activities. Your plan included a comprehensive list of tasks, identified who is responsible for carrying out each task, outlined the costs associated with each task, and stated when each task will be implemented.

Step 7: You developed new materials or adapted existing materials to convey your messages. Then you pretested your materials with members of your audience and used their feedback to make adjustments.

Step 8: You implemented your action plan and revisited your SMART goals and objectives to identify metrics for evaluating progress toward achieving your communication goals and monitoring progress toward your objectives. Based on your monitoring efforts, you made midcourse corrections to your plan and met with success!

## **Congratulations!**

Congratulations! You’ve reached the end of this module series on communication planning for program success and sustainability. In addition to developing a communication action plan, you’ve learned an important skill: how to think strategically about communication and social marketing. As a result, you’re able to put your audience front and center in all of your communication efforts, and you’re able to monitor and evaluate your progress and make improvements along the way.

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.