Strategic Communications:
From the Plan to the Public

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Many Minds. Singular Results.℠

Healthcare Georgia Foundation
grantmaking for health

About This Book

Raising awareness is crucial to the success of any health organization or program. Whether your goal is convincing people to adopt a healthy behavior, increasing funding levels, strengthening your membership base or simply generating buzz about a program, communications is a critical tool in helping you achieve results.

Developing effective communications programs can seem daunting, particularly with limited financial and staff resources. With an understanding of the essentials of communications and the right tools – both provided in this book – your organization will be equipped to plan and execute communication strategies that reach deep into your community, impact the target audience and bring your organization closer to meeting its goals.

Healthcare Georgia Foundation is committed to helping not-for-profit health organizations succeed, which is why we asked Porter Novelli, a global leader in health marketing, to prepare this Communications Planning Guide. We greatly appreciate the work of Robyn Castellani, Kristina Heuman, Melissa Taylor and Jana Leigh Thomas of Porter Novelli who developed the guide.

We hope that this guide provides you with the tools you need to help you expand your skills in communications. We welcome your feedback on not only the guide but also on other ways we can be helpful to you in communicating with the public about the important work you do.

By meeting the health and health care needs of your community, you are helping us, each day, achieve Healthcare Georgia Foundation's mission of advancing the health of all Georgians.

Created in 1999 as an independent private foundation, Healthcare Georgia Foundation's mission is to advance the health of all Georgians and to expand access to affordable, quality health care for underserved individuals and communities.

Basics of Communication

Today's consumers are more savvy than ever before. They are marketing literate and, more and more commonly, they are cynical about marketing and advertising. They can see through campaigns, often deciphering our strategy and our "ask." Add to this the ever-increasing noise and marketing clutter, and you can see how we must be smart and selective to avoid overloading our target audience.

What are the "Typical" Ways to Reach Consumers?

There are many, but the most common ways to get information to consumers are advertising, public relations and other promotional activities, including direct mail and electronic marketing.

What is the Difference Between Public Relations and Advertising?

Advertising transmits messages to your target audience via paid placement, such as television, radio or print ads, to generate awareness (and sometimes, action) about an issue/product/program or company. Public relations seeks to generate the same type of awareness, but encompasses external relationships with the media, community, public at large and other key groups (e.g., government, etc.). When it comes to media, public relations relies on "earned" placements (via outreach to reporters) vs. paid.

A key difference between the two is how your target audience perceives each. In advertising, consumers know when they're reading an advertisement they're trying to be sold a product or service. When someone reads a third-party article written about your product or views coverage of your event on TV due to public relations, they view it as more objective and credible. Another difference lies in the amount of control over the content. In advertising, you have complete control over the message; in public relations, you have influence, but not control.

What is Earned Media?

Earned media includes, but is not limited to, the following:

- Articles in a newspaper
- Television or radio stories
- Placed Internet content
- Public service announcements (PSA)

Earned media is secured by conducting media outreach (or media relations) in which you provide content (e.g., press materials) and appeal to reporters to run a story about your issue.

What is Paid Media?

Paid media includes advertisements in traditional and “new media” vehicles, including the following:

- Print advertisements (newspapers and magazines)
- Television or radio spots
- Targeted cable buys (better to reach distinct audiences)
- Cinema advertisements
- Web banners and ads
- Ads embedded in video games, DVDs and mobile phones
- Transit advertisements and posters
- Public placements, such as jumbotrons, scoreboards, etc.

For commercial messages, you should contact the sales department about advertising.

What are Non-Traditional Media and Communications Channels?

The communications landscape is rapidly changing, and every day, we are presented with new opportunities to disseminate messages to consumers.

- “Edutainment” – combining education and entertainment, such as a story line on a hereditary blood disorder affecting a patient on Fox’s show “House”
- Blogs – Web logs, also called blogs, are articles and journal entries available on the Web written by journalists, entertainers, corporate leaders and people who want to share their insights, perspective and information on topics of interest to them
- Podcasts – Web-based radio programs that offer subscriptions downloadable to MP3 players, Windows Media Player or another computer-based audio program

In addition to these “new media” outlets, non-traditional media is nearly infinite in its possibilities for reach and shelf life.

What is Social Marketing?

Social marketing is a process used by many in public health to help ensure that their health communications programs are effective. While many definitions exist, and social marketers continuously discuss the evolution of the discipline, a consensus process coincident with the founding of the Social Marketing Institute in the late 1990s produced this definition:

> Social marketing is the planning and implementation of programs designed to bring about social change using concepts from commercial marketing.[1]

[1] Social Marketing Institute; www.social-marketing.org

The core principles of social marketing include:

- Goals are for societal benefit, not for the organization doing the marketing;
- Programs are customer-driven using audience research and audience segmentation;
- Exchange is central, the benefit of adopting the behavior change should be greater than the cost;
- Behavior change is voluntary;
- All 4 P's of the marketing mix should be considered: product, price, place and promotion; and,
- Evaluation and refinement of the program is continuous.

Planning

Step One: Know What You're Trying To Achieve

Developing a marketing and communications strategy can be a daunting task, especially if you are not familiar with the process. It is important to spend time preparing and developing a plan before taking action to ensure your tactics support your overall goals and objectives.

The planning process includes every phase of campaign development including evaluation, and can be applied to individual behavior change or changes at the institutional, community or policy level. Social marketing emphasizes the use of thorough market research to identify and understand the intended audience, and then to develop, monitor and constantly adjust programs and messages to adapt to the findings of the research. It assumes that the consumer (or "target audience") should be the central focus for planning and conducting a health communications program.

The following pages will help guide you through the process of developing a marketing and communications plan, including identifying goals, analyzing the market and your competition, and writing a plan. This plan will be a roadmap for your organization's communications efforts throughout the year.

Agree To Your Mission Statement

What is your organization's mission statement? Why have you come together? What is the reason that this organization was formed?

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Identify Long-Term Goals

Think of your goals as the ultimate, long-term objectives you wish to achieve, e.g., changing behavior, changing best practices in treatment, establishing a support network for survivors, etc. When you set your goals, be ambitious – but as specific as possible. Unlike a mission statement, which can be aspirational and inspirational, goals should be measurable. Think of them as the end-point: how will you know that your organization has been successful?

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Immediate Objectives

Your objectives are the first things you will to do to achieve your goals. If goals are long-term, and can take years to achieve, objectives should be achievable in the short-term: something you can accomplish in the first year. For a new organization (or an established organization starting a new endeavor), objectives are usually the first stops along the road to a long-term goal.

For instance, if your long-term goal is to increase early diagnosis and intervention for cancer, a short-term objective might be to raise awareness around the importance of cancer screening. It helps to have a few specific, measurable objectives every year so you can make sure that your program is moving in the right direction.

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Step Two: Market Analysis

Before you can make any real progress, you must have a good basic picture of the environment around you. Assess the market situation by answering the following questions:

What is the problem you are trying to solve?

Are there any other groups and/or people trying to address this problem?
Not-for-profits, health care providers, education programs, etc. If so, what are they doing? If not, why not?

What does the public currently think or know about your issue?

Are there any existing support networks for people impacted or affected by your issue?

Has there been any recent media coverage?
Coverage of the number of people affected, disease burden, causes, costs? New scientific discoveries? Support networks? Prevention strategies? What messages are the media currently delivering to the community – positive, negative or indifferent?

Where does the local government stand on the issue?
What kind of support are they offering? Who advocates for your cause, if anyone?

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Step Three: Identify Your Target Audience

The target audience is the segment of the population you are trying to reach with your program. It might include some members of the public, health care providers or government officials, depending on your objective. The more detailed you can be about your target audience profile, the easier it will be to design a program. Most importantly: try to stay away from "general public" as a target audience. Instead, think of those specific members of the public who are most likely to be responsive to your campaign; for instance, parents, grandparents, teenagers, etc.

Three reasons to segment your audience for priority targeting:

1. Different needs: Some segments have greater needs than others
- **Size of segment:** More people in this segment creates a great need
- **Incidence of the problem** is higher in this segment
- **Severity of the problem** is higher in this segment
- **"Defenseless" or inability for self-help** among this segment.

2. Different level of responsiveness: Some segments may be more ready or able to respond to the health message than others; some may be incapable of responding for reasons of access, infrastructure, etc.

3. Different costs: Some segments may be more costly to the program because they are difficult to reach economically.

To develop a target audience profile, answer the following questions for *each audience group that you are trying to reach* – health care providers, parents, policymakers, etc.

Who is the target audience?
Be as specific as possible. How old are they? What is their income and education? How many people live in their household? Where do they live? What kinds of work do they do? What else do you know about them?

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What do they currently think about your issue?
Describe the audience's current perception of your issue. Include any positive and negative perceptions they may hold, whether or not they're true. For example: "I don't know much about the issue, but I'm not too worried. It's not likely to affect my family."

What is the best way to reach them?
Think about where you are likely to reach them with your messages. Through local news? Events? Working with health care providers? Where are some places you can go to get the word out?

Where do they currently get their health information?
Think about whom/what they rely on when seeking health information. From newspapers? Evening news?

Whom do they trust and go to for advice?
Think about the sources they go to for information? Friends? Parents? Health care providers? Professional or other organizations? Community groups? Opinion leaders?

Who else do you need to reach with your messages and information?
Do you need to get local government to support your issue? State government leaders? Political media?

Segmenting & Understanding Your Audiences:

Health Information Seeking Clusters from Porter Novelli's HealthStyles Database

- *Independent Active:* Participants sought out information from a variety of sources (e.g., Internet, magazines, books, etc.) when they had questions on health issues. They were optimistic of the health care system and viewed the physician-patient relationship akin to a consumer-client relationship. They were not hesitant about challenging their physicians and ensuring they received the best care possible.

- *Doctor-Dependent Active:* Participants were similar to Independent Actives in their views of the health care system; however, they relied less on outside sources of information. They held the doctor in high esteem, but would not hesitate to question or challenge him. They recognized the problems of the health care system, but overall seemed more hopeful that they could still receive quality care.

- *Independent Passive:* Participants seemed to have given up on the health care system. Most had negative experiences in the past with doctors or insurance coverage and did not think there was much value in participating in the health care system unless they were very ill. A few discussed their interest in alternative or herbal remedies, but the majority seem to have lost interest in seeking out health information in general.

- *Doctor-Dependent Passive:* Like Independent Passives, participants were highly disgruntled with the health care system and health insurance issues. They held doctors' intelligence and knowledge up to high esteem, yet they were frustrated with the business aspect of doctors' visits and bureaucracy in the health care system overall.

PRIZM Clustering System from Claritas

Each neighborhood cluster represents a unique lifestyle and consumer behavior pattern. The clusters were developed by Claritas, Inc. using Census data, and are tied to geographic and demographic characteristics. Two important premises underlie the clustering system: 1) "Birds of a feather flock together" – people who live in the same neighborhood are likely to have similar lifestyles; and 2) a particular cluster will possess the same characteristics regardless of where the cluster is located geographically (for example, people living in households of a particular cluster in Dunwoody, GA will have similar habits and lifestyles to households of the same cluster type in Woodstock, GA).

And What About Those Names?

The cluster names (e.g., Kids and Cul-de-Sacs) are mnemonic devices developed by the creators of the PRIZM database, and should not be considered literal descriptions. These cluster names are for **internal use only**, and should not be used in materials for volunteers or the public.

Organizations use the PRIZM clusters to identify their target markets. An important tenet of PRIZM is that the best platform for identifying new customers is to understand current customers. For this reason, many organizations analyze their databases of current customers by PRIZM cluster to identify which clusters are predominantly represented. Once the organization identifies which clusters their customers are affiliated with, they can then target other residents in those same clusters.

To identify the clusters in your target areas, go to http://www.claritas.com/MyBestSegments/Default.jsp?ID=20 and enter the zip code. More detailed reports can be ordered through Claritas, ranging from hundreds to thousands of dollars.

Step Four: Bring It All Together In a SWOT Analysis

The easiest way to synthesize research, facts and knowledge so that it will inspire insights is by organizing it into a SWOT grid.

SWOT stands for: Strengths, Weaknesses, Opportunities and Threats.

Strengths and weaknesses are issues internal to the organization, such as size of staff, internal resources, etc. Opportunities and threats are external to the organization, such as strong competitors or empathy in the market.

Strengths – *What are strengths within the organization that will help you?*	Weaknesses – *What is holding you back?*
Opportunities – *What is going on in the market that could help you succeed?*	Threats – *What could prevent your success?*

After completing the list of strengths, weaknesses, opportunities and threats, try to generate some insights by looking objectively at each of the categories and across categories. What are the opportunities in the market and what strengths does your organization have to leverage them? What external threats can you avert with your strengths? Are there any weaknesses that need to be addressed in light of the threats?

Insights could include a new understanding of your target audience: a barrier that presents a threat your organization can eliminate; an opportunity in the market that no one else is currently addressing; a strength that would differentiate your organization from others in your community.

Writing Your Plan

Once you've completed the steps above, you're ready to begin putting together your initiatives in a plan.

Key Plan Components	
Goals What are the long-term outcomes you are trying to achieve? *Example: Increase immunization rate of toddlers to 98% in two years.*	
Objectives What are short-term activities that lead to meeting your goals? *Example: Increase awareness of the immunization schedule for children under the age of 2.*	
Target Audiences Who are you trying to reach? Be as specific as possible. Who are the influencers? *Example: Mothers of children ages 2 and younger; pediatricians; public health centers*	
Channels to Reach Your Target Audience Where do they go for information? *Example: Local media; churches; doctors*	
Strategies What is a general communication approach that you can employ? *Example: Media outreach; faith-based relationship building*	
Tactics What specific activities will help you execute against your strategies? *Example: Develop a public service announcement for media to broadcast; develop a written announcement for church and synagogues to include in bulletins, newsletters*	

Key Plan Components	
Tools Do you have your message platform finalized? Materials? *Example: Media release; newsletter articles*	
Evaluation How will you measure success? *Example: Amount of media coverage, materials distributed; Number of parents calling hotline, visiting Web site, etc.; rates of immunization among toddlers*	

Developing a Message Platform

Once you have a strategy in mind and a plan in place, the first thing you need to do – before you pick up the phone and start dialing – is decide what you are going to say. Key messages encapsulate what you want the public to know about your organization, grant and/or issue you are addressing.

Your key messages should be concise, focused statements that are pertinent to your organization, issues you address and program offerings. When drafting, think of what you can say out loud in five to seven seconds that really gets to the heart of the topic. The questions below are designed to help you think through the message platform for your organization.

Medical Need

The medical angle: Why is your issue important? What are the medical implications, impact, etc.? How many people are affected in your area? Tailor your data as specifically as possible to the region in question.

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Economic Data

The economic impact: What are the hard financial costs associated with your issue (cost of care if left untreated, missed workdays, etc.)? How much does the county/state/nation spend in treating the condition or dealing with the issue every year? What would be the economic savings if your program or policy were put in place?

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The Human Benefit

Personal stories can help "humanize" the issue – and be powerful motivators – but remember that personal stories must be backed up by objective medical and economic data.

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The Call for Action

What are you trying to get people to do? What are the behaviors, policy initiatives, grassroots activities, etc., for which you are seeking support?

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Once you have identified what you want to say, you need to determine how you will say it. These key messages should become the mantra of the organization, its staff and its board. They define and encapsulate why your organization exists and what it is trying to achieve.

Space is provided below to add your key messages as you develop them with your organization.

About the organization:

Message One: ____

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Message Two: ____

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Message Three: ____

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Message Four: ____

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About the project:

Message One: ____

Message Two:

Message Three:

Message Four:

About the issue:

Message One:

Message Two:

Message Three:

Message Four:

Understanding the Media

It's no secret that the media plays a major role in both informing the public and forming the views of the public.

Why Media Is Important

Media can create broad awareness about a topic or issue – The media often sets the agenda for the topics and issues that will be propelled to the forefront of the public's consciousness. From stem cell research and the West Nile virus to the war in Iraq and Brittney Spears' marriage, the topics the media covers often become the same topics that are discussed and debated on the job, at the dinner table, in social meetings and around the water cooler.

Media can drive attention to an event or a resource – Long-gone are the days when starting a phone tree was the best way to promote an event or resource. Now, the media makes it possible to reach hundreds, thousands, even millions of people in one effort.

Media can educate the public – When it comes to complicated issues, or topics with multiple points of view, the media is often a great resource for educating the public and clarifying various perspectives. Depending on the specific media outlet (e.g., TV, newspaper, or radio), the media can help communicate the relevant points, factors, and components to educate your audiences about the topic of interest.

Media can reach a specific audience – Media outlets have come a long way over the past few years – from one major newspaper per city and a few general TV stations to a vast array of media. These days, it's much easier to reach a very specific audience through a targeted media outlet. But there are also a multitude of venues, which means you need to make decisions strategically. Today's media outlets range from cable TV stations designed specifically for food lovers, pet lovers and music lovers, to magazines that cater to teenage girls, fitness-driven men and homemakers.

What Are Media?

Some of the most popular, far-reaching media venues include:

- Television
- Radio
- Daily/weekly newspapers
- Magazines
- Online/Internet
- Newsletters

Find the Right Target

Once you understand that the media can be an effective outlet for informing, updating or exciting your target audiences, you should spend some time identifying the best outlets for disseminating your messages. Choose the best outlets for your messages with the following tips:

Television – Watched by all audiences, has the highest impact, and often, the highest standards. Great for visual stories and in-studio interviews. Television stations are competitive; consider exclusives for largest outlets. Can be difficult to get coverage, and you are unlikely to get in-depth stories.

Radio – Great for breaking, timely news with a human-interest element or community focus. Also appreciative of in-studio interview offers. Research has shown that radio is especially effective for certain groups, including Hispanics.

Daily Newspapers – Reach opinion leaders and the general public; appropriate for in-depth stories, to alert community about events and activities and to highlight a community story; consider deskside briefings to encourage comprehensive stories. Best for in-depth stories, but have smaller and more educated audience.

Local Newspapers – The best format for highly localized stories (local angles are a necessity); easy to place information and an excellent channel for regular communications. Often accept pre-prepared materials.

Monthly Magazines – Specifics vary based on type. Trade publications will focus on studies, outcomes and professional information, but most magazines run features, human-interest stories and "softer" news that is not time sensitive. Lead time can be 3-6 months.

Internet – Fast becoming popular for reaching "captive" audience; often highly targeted. May accept prepared materials.

Newsletters – A good vehicle for reaching a very targeted audience through a medium they expect and trust. A newsletter is usually concise and brief, containing news and current events that are geared toward a particular organization or group with common interests. Often best done in partnerships.

Making the Story News

News outlets are defined by that first word: *news*. Understanding what makes news is helpful in creating effective pitches (a pitch is when you call someone in the media and give them an idea or hot topic for a story). The following checklist may help you select some of the strongest elements for your pitch:

Is it new? Focus on what is new and newsworthy about your story. Examples of good media hooks can be "firsts," anniversaries and significant milestones. Can you say something that hasn't been said before? Do you have a new, innovative approach? Is there a recent event to which you can tie your story? For example, if a national story breaks about a new study on an issue your organization is addressing, take the opportunity to call your media contacts and remind them of the local activities and people in the community who are benefiting from your efforts.

Is it "hard" or breaking news? Hard news, such as new data, current day events and activities, and breaking or dramatic events never fail to get the media's attention.

Is it local? How does your story affect people in your community? How does the same issue affect people nationally? Can the local story be tied to the broader, national angle?

Is it a famous – or prominent – person? You don't necessarily have to have a celebrity (though it helps), but known people make news. Consider a well-known community leader or a local politician.

Is it a common problem? Mass media needs mass appeal. When available, use data to explain how common the health issue is: how many people are affected.

Is it visual? News is often visually appealing – do you have a story that works on TV? Are there photo opportunities or spokespeople that make great backdrops for your story?

Is it personal? Media love stories about local people and their impact in the community.

The wildcard factor. We can't always predict it, but sometimes the media covers off-the-beat stories and features (e.g., unusual world records, pets, New Year's babies, etc.)

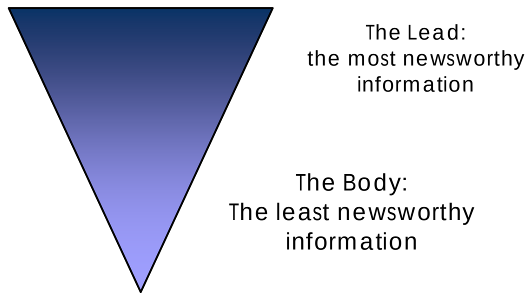
Writing for the Media

First impressions are everything when appealing to the media. Getting the media's attention is the most important factor in media relations, and you only have a few seconds to grab it. Whether in a telephone pitch or in the lead paragraph of a press release, the first few seconds are critical.

As leaders of not-for-profit organizations, learning to present information for media can be a bit of a challenge. It is very different than how we usually tell our story. We tend to begin by explaining all of the facts around the issue, building a case for why the listener should care. Once we have them convinced the issue is important, then we share the information that is most important – whether it is a behavior we want them to change, a policy to adopt or a program to fund.

Writing for the media is exactly the opposite: you start with the conclusion – the most important or newsworthy information – and then provide the supporting facts. This format serves two important purposes. You catch the reporters' interest with the most interesting information up front, enticing them to keep reading or listening. You also increase the likelihood that if the space for the story is limited, your key components are covered.

This style of writing is called the **inverted pyramid** format.



Media Tools

The most commonly used tools to reach media are releases and advisories.

Media release – a written statement distributed to the media, intended to gain media interest to write a story. An important note in writing the release: the goal is to get a reporter to pick up the phone and call for more information. Make sure you have included enough information to cover the issue, in case the reporter does not call; but don't try to answer every question a reporter might have.

Matte release – a release that is written for the media to run with minor modifications. Where a media release should be written to entice a reporter to call you, a matte release should be written as a complete article. Matte releases are primarily used to reach out to smaller outlets, with fewer reporters and less time to develop their own in-depth stories.

Media advisory – an announcement of an upcoming event for media to promote and/or attend. Advisories are like invitations, announcing the date and location of an event. They are used to reach out to community calendars, alerting the community and the media to an upcoming event.

Media kit – a tool to give a reporter containing recent releases, company or issue fact sheets or other background information for use in crafting a story. A media kit is an evolving document, comprising static information about your organization, fact sheets on relevant issues or services your organization offers and dynamic content, including recent media releases.

Building Relationships

The following principles will help you build strong, ongoing relationships with your local media.

1. Identify the Right Reporters

This is the easiest step towards getting media coverage. Start by just watching TV and reading newspapers and magazines, which you likely already do. When you notice reporters who cover issues relevant to your organization (health, children and family issues, education, or the community), write down their names. Once you've done this, you've created a "media list." Call the stations and papers to get the reporters' names, addresses, phone numbers, fax numbers and e-mail addresses.

Knowing who is covering your stories is important. Typical media outlets include network TV (like ABC, CBS, NBC and FOX), radio stations, and daily/weekly print newspapers. But are there other outlets that you should consider for your "media list?" For instance, have you considered public television, locally published magazines, and neighborhood newsletters? These are all great avenues as well.

2. Introduce Yourself to the Local Media

Media are busy people, so it's good to keep your call short, and when a reporter answers the phone, always ask "is this is a good time?" in case he/she is on deadline. If you get voicemail, consider leaving a brief message and your contact information – then follow-up, but don't pester the reporters if they don't return your call. If you do get in touch with a reporter, keep in touch. A follow-up letter will remind the reporter about your conversation. After you call a reporter, record the outcomes of your conversation in a media log, noting the reporter's particular interests. This way you can refer to your notes before calling a reporter the next time and will be familiar with his or her preferences.

3. Respect Their Deadlines!

Reporters live and breathe by their deadlines, so knowing and respecting them is the first step in building a strong relationship.

Television

- Give them several days advance notice for events, if you can.
- Try to call before their editorial meeting (generally around 9 a.m.).
- Avoid calling prior to and during news programs (11 to noon, 4 – 7 p.m., 9 – 11:30 p.m., 4 – 6 a.m.). Producers are crazy putting stories together.
- Note that final decisions about coverage are not made until that day due to the "breaking news" nature of television.
- On the day of the event, follow-up first thing in the morning to remind them of your event.

Radio

- Many of the rules of television apply, since radio is also a "breaking news" format.
- Just like TV, checking in "day of" is suggested if you have an event planned, but a "heads-up" in advance of your event is appreciated.

Daily/weekly publications/Internet

- Despite declining readership and the American public's shift to television as its primary source of information, newspapers remain a critical and influential medium.
- Newspapers originate much of the day's news, and they are more likely to have reporters with specialties, i.e., health, medicine, education, government.
- They cover the news in greater detail than do their electronic cousins. By its very nature, print does a better job of handling complex stories or issues involving ideas, concepts and intangibles.

Newspaper media

- Contact newspapers at least five to seven days before your event.
- In general, call daily newspaper reporters between 10 a.m. and 2 p.m. (after 2, they write their stories).
- You can be more flexible with weekly reporters, though "no calls after 2" is a good rule of thumb.
- Follow up calls on Friday can be most successful, as this is when journalists are most relaxed in terms of their schedules and may be receptive to speaking with you. If they like your story, they may present it (as it is fresh in their mind) to their editors in their Monday morning editorial meetings.
- Many daily newspaper reporters receive several calls from people with ideas like you, and screen calls via voicemail. Leaving a message is optional, but if you choose it, make yours brief (no more than 30 seconds) and clearly articulate your name and number. In many cases, however, it's preferable to be patient and catch reach a reporter "live" unless your story is too time sensitive.

Monthly magazines

- Magazines have long "lead-times" – the time before they go to press – so you can be fairly flexible with your pitches. It's still best, however, not to call in the late afternoon.
- Because of these lead-times, it's possible to find out what a magazine has planned in terms of coverage via its editorial calendar. You can find calendars online or by calling magazine ad departments and requesting a media kit. After all, if your story corresponds with the calendar, you've got an extra news hook!
- Some magazine editors have half-day Fridays, so rule out Friday afternoon pitches at least six to eight weeks before publication.
- If a magazine reporter agrees to do your story, be sure to check in periodically (without harassing a reporter) to determine when it will be published and whether it's still on the "docket." Schedules are prone to change in the long-lead world!

4. Create a media kit

No matter how prepared you are, no matter how long the interview, you will not get the opportunity to cover everything with a reporter. A media kit, a collection of information you give a reporter, is a way of ensuring that the reporter gets all of your information. Media kits can include a variety of materials: fact sheets or brochures on your organization; its history, mission, activities, and initiatives; issue-specific information related to the topic of the story; and even materials from partner organizations working with you on the topic.

A good media kit is used by a reporter to prepare a story or interview and to answer any questions that arise when writing a story. When introducing yourself to the media, always offer to send a kit so the reporter can become familiar with your organization. If a reporter calls you to schedule an interview, offer to send a media kit in advance (if there is time). Always take one with you to an interview and several to an event where the media may be present.

Engaging Others to Carry Your Messages

The following provides a framework for thinking about strategies to expand the reach of your organization by looking at new partners, activities and programs.

There are three basic components to setting up a successful partnership.

1. **Define your need:** what needs do you have that you cannot meet alone?

2. **Identify potential partners:** what organizations and individuals have the resources and motivation to support this cause and this need?

3. **Make your case:** how can you establish a "win - win" proposition that will encourage potential partners to work with you? What can you offer the organization for a mutually-beneficial partnership?

Step One: Define Your Need

The first step is to identify your specific immediate need. Think about your current organization. What are your greatest areas of need? What resources do you require that you cannot provide internally? There are a number of different kinds of potential partner types who can meet different kinds of needs. For instance:

Political Clout. Partners who can help you gain access to key opinion leaders and influencers; who can promote legislative action such as change reimbursement policies; who can advocate for best practices.

Fundraising/Resource Support. Partners who may have resources that you cannot provide internally: personnel support (volunteer staff and training), infrastructure support (office space/supplies), program support (sponsoring events and activities).

Audience Reach & Research. Partners who can give you access to your target audience(s); who can help you conduct education and outreach programs.

A Note On Fund Raising: Sometimes it may be easier and more productive to request specific resources rather than general funding – for instance, a corporation may be able to provide you with office space in its own building rather than giving you funding for office space; or a printer may be able to produce your materials for you, so that you don't have to raise money to have materials printed. When possible, look for these types of "in kind" opportunities, especially when you are just getting started.

Step Two: Identify Potential Partners

Once you have identified your specific needs, the next step is to identify the right potential partner to meet those needs. Some types of partners you might consider include:

Health Care Providers/Professional Associations. These partners can provide access to health care providers; medical knowledge and training resources; help in promoting best practices; etc.

Other Not-for-Profit Organizations. These partners can provide access to your target audience(s) and the general public; and can help with training and sharing resources. (However, be careful of competitive issues – while these organizations are approachable and may often share your interests, they also have their own needs.

Private Sector/Retail Organizations. Private sector corporations can offer access to customers (through in-store events, mailing lists, etc.). They can also be a source of fundraising and material support, either through in-kind donations or through straight donations.

Media Outlets. One potential partner group that is often overlooked is local media outlets. Most media outlets are committed to philanthropy and often have individuals dedicated to identifying "causes" with which to align themselves. Media outlets can be invaluable partners: they can provide terrific access to the target audience(s); they can help with education and outreach programs; and can provide an overall increase in visibility and awareness for your work – which can in itself attract more partnership opportunities.

Step Three: Identify Resources You Can Bring to the Partnership

Many attempts at partnerships do not get beyond the ask because the organization has skipped this crucial step: identifying how the potential partner will benefit from the arrangement.

Before you approach a potential partner, it's important to understand the organization's current business needs. This will help you develop a program that is as useful to your partner as it is to you. To get information, you can look at annual reports or published articles, search the Internet, visit the organization's Web site (if available), talk to members of the partner organization, etc. Some questions to consider:

Research Questionnaire For Potential Prospects

What is your prospect's corporate policy and organizational goal?

Who are the group's main competitors? What is its competition doing right now?

Who are its target audiences? How do its target audiences match up with yours?

Has the organization taken a position on your health issues or other related issues? If so, what is its position?

Does the organization have any other partnerships currently in place? What kinds of partnerships has it been pursuing?

What kind of media coverage has your prospective partner been getting? How does the community perceive the group?

Who are the key leaders in the organization? What do they personally value? Find out who should be your first point of contact – often the Marketing Director, Director of Community Affairs, or someone with a similar title.

Does your organization reach their audiences? Can you extend their reach through your activities?

Does your organization offer anything unique to them? Do they have initiatives planned or underway that you could help them achieve?

Does your organization have any key contacts or relationships that would be beneficial to them?

Engaging New Partners and Allies

What audiences have you not been able to reach with your current activities? What kinds of partners could help you reach those audiences?

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What are some new opportunities for partnerships? Have you considered partnerships in all key sectors?

Types of Partners	**Potential Partner Organizations** Who are some potential local partners? What resources could they provide?	**Benefits to Potential Partner** What can your organization offer as a benefit to the partner? What resources could you provide?
Not-for-Profit Partners Identify 2-3 new prospects. What alliances can you form to help you reach new audiences? The general public? Health care providers?		
Public Officials What are the legislative bodies that determine health policy in your area? Where do they stand on your issue?		
Corporate Partners Identify 2-3 prospects. What might a corporate partner be able to do for your organization? What corporations have products, information or events that reach your audience?		
Health Care Providers How can you expand your reach into the professional community? Who can reach your target audience and/or their influencers? Who reaches the providers?		

Step Four: Develop Your Proposal

The final step in securing a partner is developing a strong business case. While you have probably done a lot of research to get to this point, keep the proposal short and to the point – no more than two pages, if possible. Following are some specific components to include in the proposal:

The "Case"
Many times, we think of our organization in terms of need: What do we need to achieve our goals and further our mission? What do we need to make the next event a success? What do we need to pay the bills this month? While the answers to these questions are necessary for day-to-day survival, when reaching out to other organizations – and your community – you need to present your organization in terms of the value you offer, what you are trying to achieve, your capacity to reach your goals and how you are making progress. Developing a case statement will give you the tools to position a partnership with your organization as a mutually-beneficial investment, not a gift.

Who are you? What is your mission? What are you trying to achieve right now?
Highlight the specific components of your work that are most relevant to your prospect – for instance, a shared interest in children or a similar desire to work with the health care community.

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What impact have you made on the issue or population you are addressing?
How prevalent is the problem in your community? What have you done to address it? What impact have you had – on the community and in individual lives? Have your accomplishments translated to reduced costs or cost savings? What value do you bring to solving the problems?

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What are you doing that is unique?
What distinguishes your organization from any other in the community? What makes your organization special, relevant and important? What is your organization's capacity to contribute toward solving the problem? What are you - and you alone - doing to affect change on the issue? What resources can your organization bring that others cannot?

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The "Ask"
Briefly outline what you specifically want from your partner, including the precise need, timing and the expected cost to the partner.

The Reward
Be sure that your proposal includes an outline of the benefits of participating in a partnership, and that the benefits are meaningful to your partner, for instance: publicity for good work; access to a desired audience; support from your organization's volunteers; etc.

The Close
End your proposal with three reasons to participate in the program, and ask for a next step – e.g., an in-person meeting or a proposed budget.

Evaluating Your Progress

For an effective communications program, evaluation should be infused at the beginning, middle and end. With limited resources, the level and scope of the research your organization can conduct may vary. In the following section, you will be introduced to the types of research that can improve the development and execution of your plan.

Research for Planning

It is a fact of life that most public health communications budgets are not funded at an optimum level. This may tempt some program planners to skip the formative or evaluative research step to "save" funds for implementation, under the assumption that experts already know what information needs to be conveyed. Audience research, however, can provide valuable information, helping you understand whom you are trying to reach: what do they think about your issue now? What barriers do they face? What images and messages are likely to appeal to them?

Research and Evaluation in Phases of Planning and Execution

Stage	Type of Research/Evaluation
Stage 1 - Planning and Strategy Development	**Consumer Research, Market Research** **Interviews** with members of the target audience – to gauge their knowledge, attitudes and behavior **Literature reviews** – to learn how other organizations have approached similar issues **Media audit** – to get a feel for the local reporters understanding and portrayal of same or similar issues
Stage 2 - Developing and Pretesting	**Interviews** with members of the target audience – to show your draft materials and messages. Do they grab their attention? Are they understood? Does they understand your call to action? **Pilot or Field Testing** – to identify any challenges or missed opportunities on a small scale before launching to the larger community
Stage 3 - Implementing the Program	**Process Evaluation** – to document the program and indicators of success, such as the number of people attending a training session or event; media hits; inquiries to a call center or visitors to a Web site
Stage 4 - Assessing Effectiveness and Making Refinements	**Outcome Evaluation** **Surveys** – to measure changes in knowledge, attitudes or behaviors

Quantitative vs. Qualitative Research

Research approaches are typically defined in terms of quantitative and qualitative. Simply stated, quantitative research studies numbers: how many people are affected? How many people have read your messages in the newspaper? How may survey respondents agree with your statements about a particular issue? Quantitative data can be added, subtracted and statistically analyzed. Qualitative research seeks to understand context: why? Qualitative research is conducted by speaking with people. Asking questions. Getting to an understanding. It is read, not calculated.

Quantitative research

Use quantitative research methods to:

- Obtain information on prevalence of relevant knowledge, attitudes, behaviors and behavioral intentions;
- Monitor usage of materials and intended audience awareness of the communication program and its various tactics; and
- Measure progress toward objectives.

The most common source of quantitative data is surveys. Surveys are characterized by large numbers of respondents (100 or more) and questionnaires that contain predominantly forced-choice (closed-ended) questions.

Qualitative research

- May be used to explore/interpret audience attitudes, motivations and actions;
- Nets results that cannot be quantified or projected to larger populations (because the sample sizes are too small and are not representative); and
- Reveals multiple insights for planning and program development.

To be effective, the discussion in qualitative research should be somewhat structured but flexible, so that participants can respond naturally and the researcher can react by pursuing various options based on the answers to previous questions. In addition, discussion guides for any kind of qualitative research can and should be revised as necessary in between research sessions to respond to findings from previous sessions.

Methods of qualitative research most often used by health communicators include focus groups and individual interviews

- **Focus Groups:** Focus groups are commonly used in formative research for developing a communication strategy and exploring reactions to message concepts. Groups are usually comprised of eight to 10 people chosen for specific characteristics relevant to the program, but “mini-groups” of three to four people are also common. Groups should follow a structured discussion guide and be led by an experienced moderator to ensure that no particular opinions or people dominate the discussion, and that there is no “leading” of the participants toward a conclusion preferred by the sponsor. Focus groups can be conducted at a research facility, in a meeting room where people of similar characteristics are gathered for another reason such as a conference, or increasingly, via nationwide conference call.

Strengths	Weaknesses
• Group interaction can help elicit in-depth thought and discussion. • Group interaction can help with brainstorming because respondents can build off one another's ideas. • Moderators have considerable opportunity to probe responses. • Focus groups yield richer data than surveys about the complexities of an intended audience's thinking and behavior. • Excellent way to explore benefits, barriers, feelings, motivations and appropriate consumer language.	• Results are not representative or generally applicable to the general population. • Focus groups can be labor intensive and expensive, especially if sessions are conducted in multiple locations. (Teleconference focus groups can help bring costs down.) • Group responses do not necessarily reflect individuals' opinions because some individuals in the group may dominate the discussion or may influence others' opinions. • Each person has limited time to talk.

- **Interviews:** In interviews, a trained interviewer speaks with one person at a time. The process of screening and recruiting participants, developing a discussion guide, and the benefits and drawbacks are similar to those of focus groups. In-depth interviews can take place at a central facility, at the respondent's home, place of work, on the phone or Internet. Although these interviews are more time intensive, one of their key benefits is that each respondent is isolated from other respondents and is therefore not influenced by what others say.

Strengths of Interviews	Weaknesses of Interviews
• Allows researchers to connect with harder-to-reach respondents in locations convenient and comfortable for them. • The interviews can be conducted quickly. • The interviews are a cost-effective means of gathering data in a relatively short time. • By choosing an appropriate location, it's possible to efficiently recruit interview respondents from the intended audience.	• Results are not representative or generally applicable to the general population. • Intercept interviews are not appropriate for sensitive issues or potentially threatening questions. • As intercept interviewees have been pulled from another activity unexpectedly, they do not usually have time for in-depth probing.

Qualitative research need not be cost-prohibitive; often there are secondary sources that can provide valuable data. Whatever level of resources used to glean the necessary insights to develop programs, thorough qualitative research is critical to success. Without it, valuable resources can be squandered on messages, materials and delivery systems that are off the mark. Conversely, well-done qualitative research ensures that resources are used as efficiently as possible, greatly increasing the chances of reaching program objectives.

Resources

"Communications Research Methods," (pages 125 – 168) from *Making Health Communications Programs Work,* NCI 2004, NIH publication # 04-5145

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