

Education Campaign Plan Worksheet

This worksheet should be used as a guide. Don't worry about filling in each item in this exact order. Developing a counter-marketing plan is an iterative process; you'll revise and improve on each step as your campaign progresses. The most important thing is that you think through each step and that every activity moves you closer to your goal. Before you complete this worksheet, it would be helpful to review Chapter 2: Planning Your Counter-Marketing Program and other relevant information in this manual. The Counter-Marketing Planning Worksheet Guidelines on the following pages provide a quick reference to use in completing the worksheet.

Tobacco-Free Goal:

Problem Statement and Background:

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Tobacco Control Goal

- Base your goal(s) on data collection and research that was completed
- Complete a separate Education Campaign Worksheet for each goal, because you need a separate plan for each goal you're addressing. Make sure overlapping areas are consistent and complementary.

Problem Statement and Background

- Describe the problem you're addressing. Specify the group(s) affected, how it is affected, and the severity of the problem. Give supporting epidemiologic data from current research and scientific literature.
- Identify who might be able to positively influence this situation or the affected group(s).
- Explain why your agency is addressing the problem.
- Assess and list your program's strengths, weaknesses, opportunities, and threats (SWOTs); its assets and resources; links to or influence with the target audience(s); current activities; and gaps and barriers to achieving the needed change.

Target Audience(s)

- Define the group(s) you want to reach, the desired results, and how you'll measure those results.
- Select target audience(s). Decide which audience segments represent the highest priority for reaching your goal. Consider which audience segments are affected disproportionately by tobacco-related health problem(s), which segments can be most easily reached and influenced, and which are large enough to justify intervention.
- Describe each group you plan to reach with your campaign. Detail any knowledge you have about how each group is affected, as well as gaps in knowledge to be addressed through market research or other research. Include demographics, cultural and lifestyle characteristics, media preferences (channels, message appeals, activities, and types of involvement in the issue), and other traits that will help you understand how best to reach each group, as well as related feelings, attitudes, knowledge, and behaviors.
- Determine which secondary audience(s) can influence the behavior of your primary audience(s).

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Counter-Marketing Program Objective(s)

- Set objectives that reflect the desired results of counter-marketing efforts within the given time frame and resources, and within the context of a comprehensive tobacco control program.
- Write objectives that are SMART (specific, measurable, achievable, relevant, and time-bound).

Strategy Statement

- To develop a strategy is usually an iterative process; as you learn more about one element, other elements may need to be adjusted.
- Write a strategy statement for each target audience that includes:
 - Description of the target audience
 - Description of the action you want the audience to take as a result of exposure to your program, as specified in the objectives
 - List of obstacles to taking the action
 - Description of audience's perceived benefit of taking the action
 - Explanation of why the benefit, and the audience's ability to attain it, will be credible and meaningful to the audience
 - List of potential channels and activities that will reach audience members
 - Description of image, tone, look, and feel of messages and materials most likely to reach the target audience

Activities and Channels

- Assess the current media environment related to your goal, and decide which counter-marketing approach(es) to use, such as advertising, public relations, media advocacy, grassroots marketing, and media literacy training.
- Determine for each target audience which approaches (or combination of approaches) best address the problem and your program objectives.
- Ask "what is the *best* way to reach each target audience". Select channels and activities that fit your target, budget, time constraints, and resources. Consider the attributes and limitations of each type of channel.

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Opportunities for Collaboration

- Determine whether you want to recruit partners for collaboration, and consider how many partners would be optimal.
- Identify organizations that have similar goals and are willing to work with you.
- Be strategic in selecting organizations as partners. Consider which community-based organizations and businesses may help you achieve your goal by providing:
 - Access to a target audience
 - Enhanced credibility for your message or program, if the target audience considers the organization to be a trusted source
 - Additional resources, either financial or in-kind
 - Added expertise
 - Co-sponsorship of events
 - Consider the requirements for collaboration with each partner, including time for additional approvals, minor or major changes in the program to match each partner's needs and priorities, and how these requirements fit with the direction and procedures of your organization.

Evaluation Plan

- Develop plans for formative research and evaluation, process evaluation, and outcome evaluation. Base the design of your evaluation plan on the objectives of the counter-marketing program.
- Determine the most important questions for the evaluation, the information you'll need now and in the future, how you'll gather the information, and how you'll analyze it to determine whether you've met your objectives.
- Identify evaluation experts, either internal or external to your agency, who will work with you throughout the design and implementation of your program to develop plans for the various types of evaluation.
- Perform *formative research* (research on the target audience before you develop the counter-marketing campaign) to help you gain valuable insights that will guide the development of your message and materials, as well as the channels of delivery.

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- Conduct *formative evaluation* (research conducted during the development of your program to pretest and pilot test your interventions, messages, and programs) to determine (1) whether the materials you are developing effectively communicate what you intended, and (2) how the target audience will be influenced by your materials.
- Perform *process evaluation* to determine whether your program was implemented as planned. It can answer questions such as:
 - Did partners contribute as expected? Why or why not?
 - Did you have the right amount of resources?
 - Did you schedule enough time for campaign development and implementation?
 - Was your issue covered by the news media your target audience sees or reads?
 - Was your issue covered by the media in the way you had hoped? Was your approach to framing the messages reflected in the media coverage?
 - Have you become a source for journalists covering this issue?
- Conduct *outcome evaluation* to help you answer the following important questions:
 - Did your counter-marketing program achieve the outcomes you expected?
 - Did you build awareness of the ads you ran? Of the program elements?
 - Did the audience recall the campaign's main messages?
 - Did the audience increase its knowledge as desired/intended?
 - Did the audience change beliefs and attitudes as desired?
 - Did the audience change its behaviors?
 - What did the target audience think of your campaign? Did members become involved in the program?
 - Did a policy (e.g., clean indoor air ordinance or tax increase) change as desired?

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Tasks and Timeline

- List all activities that need to occur before, during, and after implementation of your counter-marketing program.
- Identify major milestones, such as launch and start dates for specific activities.
- Include smaller tasks to be accomplished from the time you write the plan until the time you intend to complete the program evaluation. By building these tasks into the timeline, you'll be more likely to remember to assign the work and stay on schedule.
- Review and update your task list and timeline regularly. It is a flexible management tool that can help you track your progress.

Budget and Resources

- List all anticipated expenses, including staff time and other resources.
- Include all budget and resources available (staff, in-kind, internal, and external).
- Assess the financial and human resources available to help you anticipate funding needs, thoroughly plan your campaign to fit your budget, and make optimal use of all available resources.
- Recall that if your plan calls for efforts to lobby for a particular bill, you'll need to use funding not provided by the Centers for Disease Control and Prevention.

Adapted from Centers for Disease Control and Prevention Designing and Implementing an Effective Tobacco Counter-Marketing Campaign