RETAIN Webinar

EFFECTIVE COMMUNIATION PLANNING FOR PROGRAM SUCCESS

Facilitators: Patrick Cook

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>> ELIZABETH NELSON: Welcome, all. We will get started in just one moment.
 (Standing by)

>> ELIZABETH NELSON: Okay. Welcome, everyone, to Effective Communication Planning for Program Success. I'm just going to go over a few logistical details as we get started here on Zoom. So if you can go to the next slide, please. As a reminder, you can use the chat box to chat throughout the session and particularly a few of us will be monitoring it also for any tech questions that may arise as we go through the session. And you can also always e‑mail RETAIN TA at AIR.org if anything comes up that you cannot use the chat for or if that is the tech problem you are having. Additionally some other helpful features of Zoom are if you need the access the closed captioning, there is actually closed captioning on your menu at the bottom. It will be specifically have a CC and say closed caption or it will be under the more menu option. If you want to go ahead and change your name to have the state abbreviation in it, you can find your name under participates and click more besides it and select rename and add that.
 So we are excited to have you here. I'm going to hand to it Lindsey to kick it off.

>> LINDSEY WILLIS: Thank you Liz. I'm so excited by the high level of participation in today's webinar, Effective Communication Planning for Program Success. I think that speaks about the able to retain programs as everybody is in their point in their RETAIN journeys here. I'm Lindsey Willis. I will be facilitating today's webinar. Before I turn it over to our subject matter expert I'd like to run through a few more logistics for you. If we can go to the next slide, please.
 For those not familiar with RETAIN as they are viewing this webinar RETAIN is the Retaining Employment and Talent After Injury/Illness Network a joint initiative led by the department of labor, the office of disability employment policy or ODEP and is funded by ODEP and the Social Security administration. Technical assistant is funded by ODEP and housed at American Institutes For Research. Focused on building state capacity in stay at work return to work strategies across ate states. Next slide, please.

 A notice for everyone. The American Institutes For Research enables the recording of audio, visuals, participant answer other information sent, visualized or used during business related meetings by joining the meeting you automatically consent to such recordings. If you wish to participant audio only, you should disable your camera. Videos shall not be transmitted to a third‑party without mission. These materials were prepared for the department of labor, ODEP and RETAIN grantees by AIR. The views expressed are those of the authors and should not be attributed to the department of labor nor does mention of trade names, commercial products or organizations endorsed by the same name by the U.S. government. Now move onto why everybody is here today. I'd like to share with you our objectives.

We are here to help you learn about effective communication planning to promote your RETAIN programs to your priority audiences and communicate your sections to your stakeholders. Understanding the key stems of the communication planning model and learn how to plan communication efforts so they can evaluated for success. Here to help us reach these objectives today is our subject matter expert Patrick Cook. Patrick is a communications, social marketing and technical assistance professional with more than 20 years of experience helping federal, state, local agency and organizations plan and implement effective communication and marketing programs. He has a experience with a wide variety of health and safety issues and has helped government and nonprofit teams develop the skills and capacity to man, implement and evaluate their communication efforts. I shall turn it over to Patrick now. As your facilitator today, I will be scanning the chat for questions as we go along. We will pause in a few places but if you have questions before we come to those, feel free to enter them in the chat and we will make sure to address them. Thank you, Patrick.

>> PATRICK COOK: Excellent. Thank you, Lindsey and thanks, Liz. Hello, everyone. Thrilled to be here with you today. Good morning and good afternoon. So we are going to be talking a little bit about for the next 50 minutes or so effective communication planning for program success. So what I'm hoping we can do over the next little while is spend a little time talking about what program communication is and what we mean by that. Then really the bulk of our time is about communication planning so you can set yourself up for success to understand whether or not your communication efforts are effective. And then finally we are going to have some questions hopefully you have some questions and answers as well as point you towards some resources.

 So program communication. Let's talk a little bit about what I mean by that. Well, I think there's really a good way to think about this. And I reach back to one of my favorite movies, the field of dreams. When we are thinking about communication I think there's two primary things that we need to be focused on. And one of them is, you know, if you build it, will they come? Meaning, if you put together your program and all the services that you're able to offer as a result of it, are you going to get people to join you and participate in those services or those programs and know about it? But also equally important, particularly when we are working with federal funding or government funding in general is if you build it, will they fund?

 A big part of what program communication really is focused on is not only marketing the programs and services, but talking about the successes of those programs and services and making sure that the key stakeholders, those who have a vested interest in your success understand what you're doing, understand how it's impacting the community, or communities, and how successful it is. So ultimately when the funding might not be there in the future then you're able to continue the good work that was made possible as a result of that funding.

 So with that kind of frame in mind, when we are thinking about the RETAIN program, the promotion is really about how do we engage these priority groups, individuals and communities who are directly affected by return to work and stay at work strategies. And who can benefit from the programs and the policies and the practices that you're all engaged in right now.
 But from the sustainability lens or perspective, how can we engage stakeholders, those decision makers and policy makers, community members and business leaders who really, again, have a vested interest or a stake in what it is we are doing and what we are doing and how they can support and sustain the work of the program.

 So program communications is a broad term but really from my perspective and the perspective of many different programs that I've worked with across the federal government, what we are really talking about are a combination of public relations. We often talk about it as PR or strategic communications. A good healthy dose of social marketing ‑‑ and I'll get into a definition of that in a moment. But also marketing. So talking about and promoting the programs and services that are made possible as a result of the program funding.

 So as I said, it's helpful to level the playing field here with some common definitions. So what I did is I just went to the authorities on these different approaches to communication and the public relations society of America talks about public relations as that strategic communication process that builds mutually beneficial relationships between organizations or I would say projects and programs, and their publics.

 Marketing is the activity that creates communicates, delivers and exchanges values. So as a result of people coming in and joining or participating in our programs or services, they get something of benefit.

 Social marketing is something that is near and dear to me as Lindsey mentioned and in my bio there I was past president of the international social marketing association so I do embrace this approach, full disclosure. It's really taking these public relations, strategic communications and marketing principals but applying them to challenges that we face as communities and as society. So it's the benefit of those who we are trying to reach and engage. So it's very similar but has a different kind of area of focus.

 But I think we can also sometimes make things too complicated. What I always find is really helpful. When we are thinking about program communication, really what we are trying to accomplish is being able to answer this question. Who do you want to do ‑‑ who do you want to do what, why and how? So it's really understanding who are those audiences you want to engage, what is it's you're asking them to do, why are you asking them to do it and ultimately how are they going to be able do that?

 So I hope you can keep that question in mind. I'll refer back to it several times as we talk about program communication but that's the essence of what we are trying to accomplish with program communication.

 And I mentioned that I do embrace and kind of have a strong belief in the power of a social marketing approach and I think one of the real insights that both commercial marketing and social marketing brings to us is that knowledge is necessary but not sufficient. So a big part of communicating is not just to raise awareness, not just to let people know about what we are doing, but more importantly it's to try and influence those attitudes that they have toward what it is we are offering the services and the programs but probably most importantly we are trying to influence what it is they do so we are trying to get toward behavior change. Now, I know there's different points on the continuum you have to know something and you have to believe something is useful and helpful before you actually go ahead and access it or use it. But I think by keeping that to use a baseball metaphor again, to keep your eye on the ball there, really what we are ultimately hoping for is behavior change in both program promotion and program sustainability, we want those stakeholders to understand how their support, financial and other ways, can have a material impact on what they're trying to accomplish in their world.

 But I think it's always helpful to maybe demonstrate that knowledge is sufficient but not ‑‑ knowledge is necessary but not sufficient for us to actually do things differently. So we are going to try a quick poll here. Jeremy, I think we are ready to go with poll number one.

 So on your screen will pop up a poll. Read three and select which of these three statements best represents what you know about regular exercise. I know regular exercise is important for reducing stress, staying fit and reducing morbidity over time. It's important for people with a history of heart disease or I know the concept of regular exercise but a healthy active person gets all the exercise he or she needs without a formal routine.

 Okay. So we will give you a minute or two there. Clearly everyone has been listening to the public health messages out there. Okay. So Jeremy, we published the poll. So 100% of you option one, excellent. So again, you've been listening
 Now let's try another poll. Let's bring up to second one. In this one select one of these three statements which best represents what you do. And it's anonymous so you can be as honest as you want. So the first one is I regularly get 30 minutes of mod exercise four times or more a week. I exercise about once a week doing different things. Or I frequently think about exercises while walking to the refrigerator or going around the house tore the truck to go down to the store.

 So we know stuff but we don't necessarily do stuff. There we go. Everyone is seeing that? Great. Yeah.

 So it kind of is a fun way but an important way that demonstrates that knowledge is necessary but not sufficient to changing our behavior. So as we are thinking about communication, I'd like you to keep that in mind that ultimately what we are trying to do is influence and ultimately change the behaviors of those who are trying to engage with our efforts.

 So how to do that. How do you do that effectively and ultimately how do you do that so you can actually measure the success of your communication efforts? Because oftentimes people start off with the best intentions. We want to engage as many communities, get as many people in the programs and services that we offer but then ultimately get to a place where they're not able to say this actually worked.

 So what I'm sharing with you here is a communication planning model. There's many other models out there but this is one that my colleagues at AIR and I have been using for many years. It's a planned, thoughtful, iterative and somewhat circular process. Communication planning is just not a one off. You got to think about who you want to reach, what you want them to do, why and how. But then that process we learn more as we go along, we want to take that knowledge and actually incorporate it into our on going communication programs or campaigns.
 But because it sometimes can feel overwhelming I like to break it down into three key phases. The first one is fundamental also. We are going to talk about that in a moment. The second is strategies and tactics. This is the fun stuff where we get to think about the materials and the social media and other things that we do to reach folks. And then it's not until we get to that fifth or sixth step where we start doing the development of those materials and all that.

 And the reason we do this is it's important to really have those fundamentals locked down prior to development and prior to launch of your program or campaign because again we want to set ourselves up for success. Just a note that there is a companion planning template. It's a Word doc so you can download it. It's on the rock. And it's available there. Download it, take it, use it as you would like. It follows an eight step planning model and you can turn this template into your own communication plan or plans.
 (Coughing)
 Excuse me.

>> LINDSEY WILLIS: Thank you Patrick. I don't see any questions in the chat but are there any questions so far before we start to walk through the steps of that planning cycle? And while people are maybe thinking of questions ‑‑ yes, I will tell you where to find this online this. Is ton RETAIN online community. Our portal for RETAIN stake grantees. If you done have access to that get in teach with the RETAIN TA team and we will get you access. We will be sending out a link with materials at some point for this webinar in one of the upcoming newsletters so it will be sent to your e‑mail at some point. One thing I would like to say about the cycle that you share, Patrick, that's a really robust model. You've probably seen something like this in different shapes and forms. You might see people talking about this but it's pretty much the same process from the planning and implementation of the evaluation and the cycle. You might see it in different forums but we are happy to share this model that we recommend.

>> PATRICK COOK: Thank you, Lindsey. That's a good point and I forget to mention this is based on the national cancer institute's health communication planning model often called the pink book. You're absolutely right, there's a whole bunch of different planning models but they do all have very similar elements. And this one just because we have found in the past it's quite easy for folks to use. And it doesn't have to be an arduous process. That's also I think another key point about this is even though there's eight steps to it, those eight steps you can do fairly quickly or take your time at it and do the research and do a lot of the investment of up‑front time and effort that helps to make for a successful communication campaign.

 But when we are talking about fund mentals and talking about setting ourselves up for success in our communication efforts, what are we really talking about here? It's these first three steps. It's looking at your current situation, where you're at and what you're doing, who you're doing it with; starting to set some communication goals and objectives. We will go over the difference between and the commonality. And here is one of the key insights we get from public relations and social marketing is identifying and clearly articulating who our priority audiences are. This is critical to our efforts. I'm going to run through those first three steps. We are going to pause of that so there will be opportunity to ask questions again. Anything that comes up, please chat them and Lindsey can cue them up when we have another discussion moment.

 So when I talk about in this first step understand your situation, this is really getting the lay of the land. As you're starting up or continuing to do the work under your RETAIN project, it's looking around and what resources ‑‑ by that I mean program, people, money, that are available to you to help you with this communication effort that you're about to embark on or about to refresh or continuing on with. Another really important part of understanding your situation is understanding the competition that is being faced by those you're trying to reach this. Is particularly important when doing program promotion because don't forget we are not the only ones who are trying to get the attention of those who we are trying to reach and engage in the services that we are making available. Right now biggest competitor is COVID‑19 and the pandemic. There's just a lot going on for people. And we have to kind of understand that. But there's also probably workplace wellness and injury prevention type campaigns and initiatives that are going on. And it's not that they're our competition but we have to be aware that they're out there and they're kind of in the environment for those who we are trying to reach.
 And then ultimately it's doing that scan, doing that literature review, if necessary, talking to some of your partners about resources and all that. And then confirming that, determining whether or not we need more research into everything a better understanding of the situation.

 With that, then it's starting to think about the goal. And the goal here that I think or that kind of one of the key ideas here is has the retain project or as your retain project and services and initiatives, you don't want to separate your communication from what you're doing in the program area. So I'm a real big advocate of connecting your communication goal to the program goal. So that program goal or goals could be what is outlined in your strategic plan or your application, your program plan, or those other guiding documents that you've put together to help focus your efforts on the RETAIN project.

 But then your communication goal is articulating that broad, general, tangible and descriptive vision of where you want to be, what the results look like as a result of engaging in this communication effort.

 You're not going to achieve all of your programmatic goals through communication. That's one of the key principals or I think one of the important takeaways. But you want to align your communication so that they are moving you towards but it's articulating at a ‑‑ from the perspective of a goal as what the results will look like. And once you've been able to do that ‑‑ let me give you an example what I mean. So here are some program goals that were articulated as part of the retain program. So your communication goal and your efforts might look something like we want more persons who are experiencing injury working in this industry and that industry participating in the program that's been made possible as a result of the RETAIN funding.
 So, again, this is kind of a program promotion type of communication goal.
 So by articulating that that we know where we want to be but to make that point again, you know the communication should be supporting your program and helping you achieve those programmatic goals. It's one important piece of the puzzle but it's not the entire puzzle.
 But how do you get to that place? How do you achieve that what you want the results to look like? And this is where I break it down into I think it's important to start articulating our objectives. Many folks put objectives higher than goals and others like myself do it the other way. I think for the sake of communication, a goal is that broader statement, the objectives are the steps towards to getting you there. And Dan Feliciano is someone who talked about goals and objectives and different business as chief things I think has a real nice way to articulate that which is your objective is specific, measurable, accountable, realistic and time‑bound condition that must be attained to accomplish in this case your communication goal. For those that know what he's articulating here is the smart objective. And I think that's really important within we are thinking about how do we set ourselves up for success because it's the smart objectives that are going to help us to measure whether or not we are accomplishing what we set out to measure.
 So when we are talking about RETAIN program, you think about that goal that we just talked about, persons experiencing injury working in these two injuries are participating in our program. Well, in order to really measure success at the end of or partway through our communication effort is we have to be able to articulate what it looks like. Here are sample objectives that might help you determine whether you're achieving that communication goal.
 Then once we do that we kind of articulated lay of the land, who or what we are trying to accomplish, what those results look like and how we think we can get there. It's time to I think do probably one of the most important parts of communication which is starting to articulate who are those people, the who we want to do what, why and when. And that's talking about audiences. I like to talk about them as priority audiences rather than target audiences. I have a brief PSA on why I like to do that in a moment. But now I think it's important from a communication perspective to defined what we mean by audience and more importantly an audience segment.
 So, for example, in our world here in the RETAIN program, workers population, large group of people, same as general public, same as all citizens, men, women, those are populations. When we are thinking communication we want to be thinking a bit more narrow. So the audience for many of the RETAIN programs and services will be workers who have been injured particularly when you're thinking about program promotion. But what I would encourage us to do is go even further than that and start to think about that audience segment that really is important for us to reach, to engage, and ultimately to persuade to change behavior, take advantage of our programs and services and other things so that we can start achieving success with the communication efforts.
 And in that case, we need to be even more specific than just workers who have been injured but we need to be thinking about, for example, workers who have been injured and are at risk of not returning to work. So that's our audience segment. And if we had our marketing hat on we would be talking about that as our market segment.
 How do you get there? How do you start defining ‑‑ excuse me ‑‑ your audience segment to really understand who is the best group of that large audience or population that we want to reach?
 A colleague of mine, Craig la Faye (phonetic) he talks about we can define our audience by answering these three questions. First, who are the people at highest risk and in case who are the people at highest risk at not returning to work or being able to stay at work. Sometimes it's not just the highest risk but it's also those people most open to change. For those that know things like the innovation and other behavior change theories is sometimes we want to reach those who are willing to try something new or different, early adopters, because they're the ones who might bring the others along. It would be the influencers in our community in a workplace, in an industry.

If we can reach them, then others might come with them. Or it could be who are the groups that are critical for success? Who must we bring in in order for us to be able to demonstrate that this communication effort or these communication efforts are really doing what we set out to accomplish? So in the context of RETAIN it could be an audience segment, it could be workers who have been injured and are at risk not returning to work because they're at highest risk. They potentially could be open to change but they're also critical for success in what we are trying to accomplish.
 Excuse me, I have one of those scratchs in your throat that always comes up as soon as you start presenting (laughter) so if I take water, you know why.
 But how do you unpack that large group of people known as either a population or an audience? And in marketing and public relations strategic communications, health communication, we all talk about doing formative research. And the research that I'm talking about is just what it says. And these are things like we can look at surveillance data, we can understand what is happening in a community, we can work with the different players, stakeholders who have the data on workplace injury and all that prevalence there. We can also do some primary research and this is a really important aspect of what we do which is talking to the people we are ultimately trying to reach and understanding their world, understanding them through focus groups, interviews, discussions, one on one conversations, whatever resources allow time allows but just having those conversations because we really want to start developing for our priority audience segment not only what they know, not only what are their attitudes but what are their current practices, not unlike what I did with the poll at the beginning of the discussion here. Understanding what it is we do as well as understanding what we think and believe.
 Part of thinking about audience, not just that primary audience but it's also who can influence them. We often talk about these folks as the secondary audiences. Not secondary because of any type of value or anything like that but it's more influencers and they sur sound those who we are trying to reach so they could be people who change the minds and change the behaviors of priority audience suggest. They might be the managers, the work colleagues, the union and community leaders, friends and family, they might be all of those folks who surround the communities that we are trying to reach.
 I said I was going to do a quick PSA. If for those of you who have been doing communication and marketing for pay while, the term target audience is a critical or key term. More and more of us have be trying to move away from this for no other reason other than target tends to have this us versus them type of connotation. The origin of the world target is an older Norse word, Viking term, for small shield. So I guess a target was a small shield so in war I guess that's what you did. I guess we are trying to suggest that we want to be more engaged in co creation and not targeting the other but bringing people along with us. So that's why I tend to prefer priority versus target audience. Let's pause there and see if there's any questions or any clarifications, Lindsey?

>> LINDSEY WILLIS: It looks like we have a question in the chat from Karen in Vermont. What do you do when you have two priority audiences and you don't want to let people down. For instance they have a randomize controlled trial but they're also trying to reach stakeholders who are not part of the study. How do you manage that? Karen feel free to jump in if we are not interpreting your question but it sounds like two different audiences, they might have different communications needs, different background. Patrick, what are your thoughts about that?

>> PATRICK COOK: It's a really good question. And this is the kind of perpetual dilemma that we find ourselves in. Because we are not the Toyota's and Coca Colas and the large agencies that have all the money in the world to communicate to all those different audiences. Priority audience is an important term. We have to reach someone first and target there. But at the same time I think if we are doing a program promotion type of activity, there are ways to stay ‑‑ keep the stakeholders engaged and communicating success.
 So as long as we have I think a clear understanding that there are two different different audiences or two different audiences with information needs and all that, we can plan the communication effort so we are reaching that priority audience, encouraging them to use the services, but starting to communicate back to our stakeholders, our funders, our key folks who are critical to our success by using some of the messaging that we have developed, by using some of the materials unadapted for their needs.

>> LINDSEY WILLIS: Thank you, Patrick. I was thinking the same thing before you said that last sentence. We might have a core body of materials that we adopt for different audiences so no need to re‑create the wheel, it's not necessary.

>> PATRICK COOK: Yeah, exactly. Another important thing to be thinking about when you're talking about making choices about audiences is there is a tendency, we want to reach everyone all the time in the best way possible but there's an adage in communication and marketing that the broader your audience, the less likely you are to succeed in engaging them.
 So by that focusing and selecting those priority audience segments, you have a better chance of success so therefore you have a better story to tell about what it is you're doing to those key stakeholders you're trying to keep engaged.

>> LINDSEY WILLIS: I don't see any other questions at this moment, so, Patrick, shall we move onto the second phase of the model?

>> PATRICK COOK: Sounds awesome. We talked about lay of the land, what we are trying to accomplish, what success looks like and ultimately how do we plan to get there. And then with whom. So now let's start thinking about those strategies and tactics that that will help us get there. And in the eight‑step model we are using for today's discussion it's really looking at step four and step five. Step four is develop and pretest messages. Step five is about selecting channels and activities, materials and partnerships that help us engage those different priority audiences.
 I will say often I work with community coalition, federal agencies, corporations and all that. A lot of times when they bring in the communications folks they tell you we want a website or we want to do a social media campaign and all that. That's really important information to know. But that's step five of this model. Because one of our themes is how do you set yourself up for successful communication efforts, doing the fundamentals first will help you make really good choices about your messaging and material development and channel selection.
 So notice where in this planning model development of the materials starts which is halfway through. So half your work is up front, the other half is afterwards.
 So when we are talking messages, again some of the key insights we get from our friends who are working in public relations and strategic communications as well as in marketing, is of course it's really important to know what we want to say, what we want to tell people about the program, about the service, why it's an important program or service, how it will help them stay at work or return to work. But important insight is understanding what they're able to hear. And again it's going back to what is going on in their world. What is their current situation. What is happening that could impact what it is they're able to take in at the time.
 And so how we start to understand that is going back to some of that audience research that, formative research. Because we have had those conversations with folks, because we talked to them about their knowledge about a particular area, their attitudes but more importantly what they're doing. Then we start to think about our messaging needs to solve a problem for them. We need to help them understand what it is we are offering them as a program, how it's relevant and urgent to them, where they should take action on it.
 So messaging in program communication is kind of a balancing act of determining how you can lower the barriers of participation and increase the motivation of people wanting to take advantage of your service or your program.
 And some of you I'm sure adhere to this and others might be surprised to hear but when we are engaging in program communication particularly when it's influenced by the practices that I've talked about, social marketing and health communication, we are not here to change people's values. We are not here to change what they fundamentally believe about the world. What is important when we are starting to message is putting together how we want to engage folks is understanding what is important to them and aligning our messaging to their values.
 So if you're in a community or trying to reach communities where family is incredibly important or the value of independence and kind of individualism, we don't want to necessarily change that. We just want to align what it is our offering, our product or service, to those values so that the folks that we are trying to reach can see our program and service in their world.
 I also said this moments ago but I think this is a critical part what of we are trying to do in program communication. We are trying to turn our program or service into something that is relevant and urgent to them. Why is it important that we are helping folks to stay at work or return to work sooner rather than later? Why is the prevention efforts that we are engaged in important? We know why it is. It makes a huge difference in the lives of the individuals but it also makes a huge difference in the community and our stay overall. But we have to make that issue relevant and urgent to the individuals we are trying to reach. And we do that by solving problems for them. Could be problems of how to stay engaged with the family, that rugged individualism; could be financial issues, things like that. But we are trying to message into their world and not persuade them to believe differently but understand how we fit in.
 And again, lowering our messaging should ideally lower the barriers to them changing their behavior by making it more attractive for them to take advantage of the programs or services.
 One of my favorite kind of thought leaders in social marketing, he says our job in social marketing ‑‑ I think we can generalize this to program communication ‑‑ is to make target behavior, fun, easy and popular. It's not necessary that a program or service is fun but it's really how do you make it so it's an enjoyable or something that is going to be a benefit to those who we are trying to reach?
 Many different disciplines and folks, communication shops and agencies have different ways of doing messages so this is just one way. It's a series of sentences and propositions. But for a RETAIN program that where you're trying to promote programs or services, it my be something like let's be ‑‑ the appeal is workplace injuries like low back pains sprains and strains can lay you low and keep you away from work so that affects your financial standing, affects what you can accomplish as an individual. So getting help and treatment early can make a world of difference. There's our key message there. And we solve the problem. How can we get help and treatment early? I can get in touch. And this is a made up service but this is when we are thinking about how do we align our messaging with what is important to the folks that we are trying to reach, this is kind of a sample.
 I think another key thing to be thinking about is we can to the best of our ability make some good guesses, educated guesses, no doubt about what is going to resonate with our audiences. What are those key points that we need to make in order for people to listen and then ultimately change what it is they're doing.
 But I keep going back to it's really important to engage those we are trying to reach so testing our messages in our world is called pre‑testing. It's running these messages, these words past folks prior to starting to develop materials and put them over our various channels is important because what we see may be different than our priority audiences are seeing.
 So I encourage you time and resources available do as much message testing as possible.
 So we have got some fabulous messages. We pretested them, we talked to different folks. And they have told us that this messaging will make the issues relevant and urgent to them. Now we get to the fun stuff. How do we get those messages out? How do we engage with folks and how do we promote our program or talk about our successes? So this is step five in the model where we are starting to think about channels. Channels are, you know those ways that we reach folks and I have some examples in a moment. Those activities. Those things that you could be doing both virtually and ‑‑ because virtually is very important these days as well as in the bricks and mortar world that will help to raise the profile but help to deliver those messages to the priority audiences. And what are the materials, the things we need in hand either digital or paper‑based or whatever that will help us engage with the folks.
 Fourthly, I think a real critical and sometimes overlooked channel or important way, conduit to engage with our audiences is our partnerships. Many of you already have those coalitions put together and you're working with partners with other organizations and agencies. How can they kind of join us in this effort to do the communications?
 So this is by no stretch an exhaustive list. But when I'm talking about channels, I've divided into three many areas. We have people. People are channels, conduits to those we are trying to reach. In the world of RETAIN project answered programs it could be the bosses and co‑workers, friends and family, community leaders or other trusted authorities. We want to engage them as key spokes people for our effort. So a lot of times the work of ‑‑ and it was the question that we just talked about previously, you know, how do we not only reach the priority audiences that we are trying to engage in the services or take advantage of the services, but how do we talk about the successes?
 Some of the people that are in our partners are a great way to think about that, you can have them kind of acting as advocates and empower them to be as advocates for the work that you're doing. So any time there's opportunity to talk about the good work that you're RETAIN project is doing, they can be empowered to talk about it.
 Then channels are also places, they're physical places. As simple as the laundry mat in a community or laundry mats across a city, the schools, the community centers, the places of worship, all of these places where people gather. What determines where we want to be is where our audience is. Where our priority audience suggest is. So where they spend in time. And that helps us make some choices about where we need to be. And finally this is kind of the traditional or what people most often think of communication channels. It's the digital channels, the websites and the social media, the e‑mail and the text messaging and the apps. It's also some of those broadcast channels, TV, radio and print. We are doing town halls or there's a lot of stuff we are doing via Zoom so those are all ways we can access and kind of engage with our different audiences.
 But how do we do that? Or what are some other things that can happen? Whether it's in the community ‑‑ now, again, the current situation we have to adapt to it and there are ways to do things like press conferences and community gathering and job fares and all that. A lot of those are happening online virtue town halls. But also post COVID and all of that. These are opportunities for you to get out and start talking about the successes, if we are talking about program sustainability, but also particularly if you're launching a campaign, if you're starting to ‑‑ the program is up and running, and you're trying to reinvigorate to get more folks enrolled in the program, thinking about some of these activities and events that not only allow to you directly engage with and connect with your priority audiences but they do other things like they can generate what we call earned media, get coverage by the local television station or the newspaper or the online information source. So these activities and events are another way to amplify the message that we are trying to get out. It's actually the materials that we developed. There's so many different things that you can be thinking about but just a sampling of some of the materials that are possible to help you both promote your program as well as start to talk about the successes of your work are things like fact sheets and posters and info graphics, success stories and articles, videos and buttons and banners to use on social media and websites. Very tangible things like T‑shirts and stickers and decals that can be posted around the community or around the communities.
 Public service announcements, advertising, other things. Social media campaigns. I know probably many of you are already doing a lot of social media or at least thinking about it. These are other things. That's one of the channels developing the messages, developing the images and the visuals that are a key part of any social media effort would be part of your materials development.
 And back to Lindsey's earlier point, many of these products ideally are materials we want to make audience specific. So a fact sheet that talks about the benefits of stay at work or run to work strategies will be and should be written differently if you're trying to reach workers and those who are directly impacted by that versus if you're talking about or trying to reach or communicate with some of the key stakeholders. Because, for example, you won't necessarily want to talk about the cost savings that are reaped as a result of early intervention and prevention around workplace injury issues when you're talking about those who you're trying to engage in your program. But that's probably going to be some really important aspects of what you're could go for some of your key stakeholders.
 So you can develop ‑‑ we often say you develop once, publish many times. That's coming up with key messaging. And thinking about the different ways that you can create materials that are adapted for those different priority audiences and secondary audiences. You're likely to have more than one poster and success stories for when you're reaching out to workers and bosses and co‑workers are going to look different when reaching out to some of the folks who are stakeholders in your effort.
 So I'm going to take a sip of water and we are going to do another quick check in.

>> LINDSEY WILLIS: Patrick, I'll real view what has been happening in the chat. At the end of our discussion about fundamentals Rita had asked how extensive should your research be and where do you look for this info? At that point we had been talking about audiences and learning more about them. Karen, she chimed this thank you so much, focus group or a good place. And part of the research is learning about the channels where you're audience is. Really we can take this research question and apply it to not just the fundamentals but the strategies and tactics of what are some sources for learning about your audience and also about the best ways to reach them?

>> PATRICK COOK: It's a great question and like all great questions it has the answer it depends. You know, so it depends on resources available to you, time and all of that. But some of the key strategys that we use in communication and marketing are focus groups and in‑depth interviews. We often will host online forums where we have the discussions. There are also secondary sources where we can go so as I was saying there's data sources and all of that. How much and how in depth you do it does depend how much resources you have available or how many resources you have available to you. And let me give you a good illustrative example. I'm doing some work with some folks up in Alaska and they're working across the state to work on different issues in this case around violence prevention. What they're going to be able to do in terms of their formative research is different than some other folks I'm working with at a federal agency where they're doing a large campaign around another health‑related issue. And for that federal agency we are doing 24 focus groups and almost 50 in‑depth interviews that's lasting over six months.
 So there's significant funding that they're able to put into that formative research and really understand who their audiences are, what they think, what they believe and what they do. And then there's the folks working in the communities across Alaska who have a few hundred dollars to engage in their work.
 So funding makes a difference. You can also I think what is really important is take advantage or work collaboratively with your partners, with other community groups, could be working with unions and others, where there's already an established relationship with the folks you're trying to reach. Maybe it's tapping into regular meetings that they do and having a good hour long discussion at one of their monthly meetings about what it is you're trying to accomplish.
 So it doesn't necessarily have to be formal focus groups or in‑depth interviews or surveys. It can be taking advantage of what is there in front of you.

>> LINDSEY WILLIS: Thank you. Please answer the question you have on screen here about what are some of the materials that worked in your communications efforts so feel free to drop that in the chat. I would also like to open the line to our technical assistance team. If anyone has a question they would like to ask on the line, please go ahead. Just to put a Capstone on the research question, American Institutes For Research we have a very talented staff of researchers including some experts in research methodology on the RETAIN TA team so check with us if you would like help with that part of your program.

>> PATRICK COOK: Lindsey to piggyback on that, that's a really good point because often folks who are helping you to evaluate your program are good folks to think to involve in your communication effort. Going back to the key point at the beginning, you want to tie your communication efforts to your program efforts. They can help you start to think about had you do you define those objectives and how do you talk to the audiences so you have a better understanding. And setting up the monitoring and evaluation research that's critical to determining whether you're hitting objectives you set out for yourself.

>> LINDSEY WILLIS: From a promotion perspective when you're planning communication efforts and messaging, how much do you need to line the message between the stakeholder and the customer?

>> PATRICK COOK: So how much ‑‑ that's an interesting question. I mean, you'll always hear me say who do you want to do what, why and how. And so therefore it depends ‑‑ one message and one material ‑‑ one size won't fit all. So if you're trying to reach out to engage the customer in this case I would imagine we mean the clients that we want to take advantage of the programs and services, the messaging and the appeal to them is going to be different than the success stories or the ongoing engagement of our stakeholders. We want to in our discussions ‑‑ I'm doing this visually here ‑‑ in our discussions with our stakeholders over here we may want to tell good stories, get that data and use that data qualitative as well as quantitative data to talk to our stakeholders about the successes with this worker X or this community or this folks in this industry.
 But I would encourage people to think that you need to target your messaging and adapt your materials and activities and partners around who you're trying to reach and ultimately what you want them to do.

>> LINDSEY WILLIS: Thank you. We only have a few more slides left but we are getting close to time so Patrick I feel like I will ask that we move onto the last part of the module. We will have time for questions at the end but feel free to drop them in the chat.

>> PATRICK COOK: We don't have far to go here. Again, I'm going to put in another plug. We were just talking about it. How important it is to do testing. And testing and having those conversations with folks you're trying to reach right at the beginning when you're starting to talk about messaging and when you're starting to develop materials and all that. This is just a funny actual illustration of what happened when folks were doing some giveaways and thought wouldn't it be great if we put it on a pencil like this. How many people use pencils anymore I don't know but this was the slogan they had on the pencil itself. Of course as you ground it down in the pencil sharpener it had a very different message.
 So making sure that the materials are going to work before you do production, before you print a thousand or 10,000 brochures or posters or put a lot of time and effort into a media launch, it's really important to think about testing and asking some representatives of your target audience, I did it there, your priority audience, will these work? Do you see any issues? Do you see any problems with distribution and use and all of that? Because you're going to save your self a lot of time and money if you test up front.
 So, just to put a bit of a bow on it. Once you develop the fundamentals and have a clear sense of who you want to reach ultimately what success looks like, how you want to reach them, what you want to say to them, critical to success of any communication effort is thinking about who is going to do what. I mean, so many times we develop a great plan but without that and action planning who is going to do it, when are they going to do it, what are they responsible for, often the best‑laid efforts go by the wayside. Kind of my parting thought with you at least today is to think about how do you develop a robust action plan so that all the great effort that's gone into the communication planning doesn't go by the wayside? And that's many different ways to do this. There's great tools out there, there's online things like smart sheet and different project management tools. But it's really ultimately I think determining what are your mayor tasks and activities to get the work done, to plan the launch events and et cetera, the webinars, putting target dates to them. This is ‑‑ Lindsey and Becky can speak to this and technical assistance in general. Really making sure that folks are responsible, an individual or at least individuals are responsible for getting it done because that's really going to help you make sure you meet those targets that you're trying to accomplish.
 So, what it might look like is who is going to do the lit review, to ho is going to do the environmental scan, who is going to plan the session with their advisory group, et cetera, et cetera.
 So maybe some other feature date we will get to talk more about how do you go into production of these materials, what do you do when the campaign important program is mid‑course and you get data that tells you you should do some corrections. But for now I'm going to turn it back over to Lindsey. So thank you.

>> LINDSEY WILLIS: I'm going to turn it over to the group. I haven't seen any new questions come into the chat. I would like to open the line right now though so if anyone would like to verbally ask a question of Patrick, now is your chance. I'll give everybody a moment.
 All right. Going once, twice, and three times.
 I'll ask a question, Patrick. This is a tricky one. At the very beginning of the presentation you talked about behavior change and how behavior change is something different than just understanding information. We haven't talked a whole lot about how we are going to measure things but I want to bring up the distinction. There's a difference between measuring how many banners you've printed or how many social media posts you put out and how many people actually have gone ahead and changed their behavior. I think in this RETAIN we can count the number stakeholders, participants and enrollees but I wanted to see about thinking about measuring outreach efforts and measuring the impact of your end result. And Rita I see your hand up. We will get to you next.

>> PATRICK COOK: It's a great question, Lindsey. Because often that's how communication efforts are measured is by these process measures. So how many hits do we get on the website or how many retweets or how many things we produced. But that's important data. It's important information. And I certainly wouldn't want to say don't focus on process data or measuring process things like that. But how do you start measuring whether or not you're getting to folks and connecting with them and ultimately starting to encourage them to change their behaviors goes back to your objective. The communication objective also.
 I think it's important to be realistic when thinking about those objectives. About what can actually be accomplished through communication. So what from a communications perspective are you trying to measure and articulating that, quantitatively and potentially qualitatively but also making it time‑bound. So by such and such a date we are hoping that more people, A, know about it, or, B, more people are inquiring about the service. That's how it's important to get those right up front because articulating those objectives are going to help you come up with the right measures that will tell you not only that you're successful in producing things and getting people to engage with communication but ultimately to determine whether or not they're starting to change their behaviors.

>> LINDSEY WILLIS: Thank you. I think it's so well‑said. I think we do have time for Rita's last question here. They might be looking to put all those strategys in action that we are discussing. If you're looking to hire a communication agency, what are some things to consider? She says they are quite busy as most of the state teams here. And communication planning is something else to do. So if you want to bring in outside help, what are some things to consider?

>> PATRICK COOK: It's a good question. I would start probably within your agency who are currently working with communication firms. They might share? Successes on how to procure services from a communication firm. If I were to be vending out things like this, you certainly want to make sure that their proposed approach to your communication challenges is aligned with what you're trying to accomplish. So getting a good understanding of how they approach it. Some agencies are very narrowly focused, they are advertising agencies or public relations agencies. They bring specific skills to the table. Much of the work we do around wellness and injury prevention we probably want to be looking at those agencys that do more comprehensive approach. But I think talking to the communications folks within your agency would be a good way to get a sense of how to procure those services.

>> LINDSEY WILLIS: Thank you. If anybody else comes up with any other questions in the next couple minutes or following the webinar, feel free to connect with your technical assistance liaison and we will make sure the questions get routed appropriately. We have some concluding materials. Patrick shared resources including the communication planning template that will be available on the rock. As a reminder the rock is also sorted by topic areas. We have a whole topic area on communications and branding material also so in addition to this you'll find some other materials that the RETAIN TA team have shared to help you with your communications programs so please feel free to check out those. And if you have any questions or recommendations for other materials we might be able to help you with, feel free to let your liaison know and we will be happy to talk to you about that. Next slide, please. A few references that Patrick shared if you're interested in exploring more. Thank to you Patrick. Patrick will be coming back to present a follow up webinar within a few weeks. We will start to put some of these strategies into motion that we discussed today and learn more about telling your story so please be alert and stay tuned to hear more about that.
 I think our final slide we thank you for joining us today. We would love for to you participate in our evaluation so we can understand what worked for you, how we can Taylor our technical assistance events for you. We dropped a link into the chat so you can access it directly from there. Any questions, feel free to reach out to the RETAIN TA team and we will be happy you help you. Thank you Patrick. We look forward to seeing everyone again next time.

 (Webinar concluded at 2:12 p.m. CT)